

# Tax Organiser

Use this Personal Tax Organiser to keep all your tax documents together and as a checklist of what to provide to us at the end of the personal tax year.

It probably helps...

1. To open a folder, place this at the front and file all your tax documents behind in an organised manner.
2. If unsure, whether to include anything, put it in with an explanation.
3. If you need more space for any areas, please use a separate piece of paper.

## **Personal Information**

Full name \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

National Insurance No

Tax Reference No

Date of birth

Male or Female

Spouse/civil partner full name

Date of marriage/civil partnership \_\_\_\_\_

Spouse/civil partner date of birth \_\_\_\_\_

Are you resident in the UK: YES/NO

## **Statement of Account**

Please provide copies of any Statements of account received from the Revenue.

### **Interest Income**

Please provide a certificate of interest received from each source in the year or bank statements or details of the interest received (gross, tax and net) making clear if any accounts are joint accounts.

How many accounts do you earn interest from in total \_\_\_\_\_

### **Dividend Income**

Please provide all dividend vouchers for dividends received during the year.

How many different sources do you receive dividends from \_\_\_\_\_

### **State pensions and benefits**

Enter the weekly amount of state pension received during the year  
£ \_\_\_\_\_

If this started during the year, please provide the start date \_\_\_\_\_

Please provide details of any other state benefits received during the year and form P45U or P60U in respect of any incapacity benefit or jobseekers benefit received...

<b><u>Benefit</u></b>	<b><u>Amount received in the year</u></b>
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### **Pension Income**

Please enclose a P60 for each pension received during the year and list the names of the payer(s) here:

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## **Employment**

Please provide details of your employers name and your occupation along with form P45 or P60 and tax code notice:

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Date employment commenced or ceased if during the tax year  
\_\_\_\_\_

If you are a director, is the company, a close company: YES/NO

Please provide a copy of your P11D with showing any benefits in kind.

Please provide details of any lump sums received \_\_\_\_\_

Please provide details of any tax deductible expenses you incur personally with your employment \_\_\_\_\_

## **Self-Employment/Partnership**

Please indicate if you have had income from self-employment or a partnership and the nature of your trade. If we do not prepare these accounts, please provide copies of accounts and tax computations.

## **Land & Property**

Please provide details of rents received and expenses incurred in respect of let properties and identify whether they holiday lettings, furnished or unfurnished lettings. Provide a certificate of any mortgage interest paid.

## **Capital Gains**

If you made any capital gains during the year such as from sale of shares, property (not your main residence) please provide dates and amounts of cost, sale proceeds and incidental expenses. Please supply contacts/completion statements.

## **Pension Contributions**

If you made any pension contributions to a personal pension, retirement annuity or free-standing AVC scheme (type), please provide details and identify those paid gross or net of tax. For new pensions taken out in the year, please provide pension certificates.

Pension Company	Policy No	Amount Paid	Type	Paid net or gross
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

## **Reliefs**

If you are entitled to any of the following reliefs, please indicate:

Blind persons allowance \_\_\_\_\_

## **Other outgoings**

Please provide details of any other relevant outgoings. For example:

Interest on qualifying loans – please provide interest certificate  
Venture Capital Trust subscriptions  
Enterprise investment scheme subscriptions  
Gift Aid payments

## **Any other information**

If there is any other information at all that you think may be relevant to the completion of your Tax Return, please provide details. This could include any other income of any kind such as gains on life assurance policies, share schemes, foreign income, trust income or any other income of any kind. If in doubt, please provide details.