

Client Name: _____

Personal Tax - Checklist

Please could you answer the following questions that will assist us in the preparation of your personal tax return for the period 6 April 2025 - 5 April 2026

Please note that the questions below are a comprehensive listing and may well include information we already have or prepare in house. Please could we ask that you answer each question regardless if provided previously and provide any additional information where you have answered yes.

Personal Tax Questionnaire

	Yes	No	N/A	Evidence Provided
Employment/ Self Employment				
1 Did you have any income from Employment during the period				
1a If so, please provide P45 and/or P60 certificate				
2 Did you received any benefits-in-kind (BIK) from your employment				
2a If so, please provide the form P11d				
3 Did you have any self employed income during the period				
3a If so, please provide books and records				
Pensions				
3 Did you receive a State pension?				
3a If so, please provide the figures received.				
4 Did you receive any income from a private pension?				
4a If so, please provide the P60 certificate				
5 Did you make any personal pension contributions in the year?				
5a If so, please provide amounts contributed and/or your latest pension statement				
Savings				
6 Did you have income from savings held outside of an ISA (interest, bonds, NSI)?				
6a If so, please provide interest certificates				
Investments				
7 Did you have dividend income from investments?				
7a If so, please provide dividend vouchers/investment reports				
7b Did you purchase or dispose of any shares/investments during the period?				
7c If so, please provide details of acquisitions/disposals incl. number of shares, prices etc.				
8 Did you have income from rented property?				
8a if so, please provide the details of rental income and expenditure (please include rental statements and rental bank account statements, if applicable)				
8b Did you purchase or sell a new investment property?				
8c If so, please provide the completion statements for purchase and/or sale				
9 Did you purchase or dispose of any cryptocurrency during the period?***				
** Please note that this includes exchanging crypto for any of the following: 1 Other cryptocurrencies 2 FIAT - £GBP or other 3 Any goods or services				
10 Did you make any EIS of SEIS investments during the period? If so please provide either form EIS3 or SEIS3?				
Overseas				
11 Did you receive any income from any overseas source, e.g. Investment property Dividends from overseas companies Other				
Other				
12 Did you make any GiftAid donations during the period?				
12a If so, please provide the list of charities, date of donation and amounts donated				
13 If you (or a partner with whom you co-habit) are in receipt of Child Benefit, please confirm if you or your partner's income is greater than £60,000 If yes, please can you confirm how many children you claim child benefit for				
14 Please confirm if your wife's/husband's income for the period was below £12,570				
15 Please confirm if you have an outstanding student loan that is in repayment				
16a If so and you were employed, were any loan deductions made from your salary?				
16b If your loan was repaid before 5 April 2023, please provide the date of repayment				
16c Please confirm what plan type you are on (Plan 1 - if you started your course before 1 September 2012). (Plan 2 - if you started your course between 1 September 2012 and 31 July 2023). (Plan 5 - if you started your course on or after 1 August 2023).				
17 Please confirm if you have received any interest income from loans to a company				
18 Did you receive any taxable state benefits such as jobseekers, incapacity etc?				
19 Please confirm whether you were UK resident for 2022/23?				
20 Please confirm if you have any other income not listed above*. e.g. Royalties, estate or trust income or life assurance withdrawals over 5%				