

2023 TAX RETURN: INFORMATION FOR THE YEAR 06/04/2022 TO 05/04/2023

YOUR NAME:

Email:

INCOME: In the year to 5 April 2023, did you receive any:

State Benefits paid by the Dept of Work & Pensions or the Benefits Agency (this includes Jobseekers Allowance and Income Support, but not Universal Credit). Yes No

.....
 Name of Benefit Office Taxable Amount Received
 Please include any P60s, P45s & paperwork you have received.

Child Benefit: Did you/your partner receive any during the year. Yes No

If Yes - list names and dates of birth of children for whom you received child benefit.

.....
 and did you have a partner in 2022/23 whose income is in excess of £50,000? Yes No

Rent from letting out another property or part of your house Yes No
 If Yes, how much rent was due and what expenses were incurred.
 We'll need the rental statements and receipts for ALL expenses for the property. **Please get a certificate for any loan interest (i.e. mortgage) you've paid on rented-out property.**

Bank/Building Society Interest Yes No
 Please list all accounts, including foreign bank accounts and send copies of all interest Statements.
 If it's a joint account just put in **THE WHOLE AMOUNT** AND WE'LL DO THE MATHS!
 Please note that Rewards are received net of tax.

Bank/Building Society	Total Gross Interest Received	Joint? (Y/N)

Don't forget National Savings/Post Office/little used accounts. We need to know if it's an Ordinary or an Investment account.

Any other interest Yes No
 If Yes, how much and from whom.

Dividends or Unit Trusts Yes No
 Please list below and send the dividend vouchers if you have them.
 If you have mislaid any, let us know how many shares you have and how much you received approximately.

Company/Share	Date	Dividend	Joint? (Y/N)

Other income, including settlement or investment/trust fund, income from the estate of someone who has died or partnership income. Yes No

PAYE/Schedule E Income/Pensions you've received:

List any income received in the year from 6 April 2022 to 5 April 2023 from which tax and/or National Insurance have been deducted, unless it has an 'NT' code and is included in your self-employed accounts.

Please send in your 2023 P60 (now or when you get it) as well as the last payslip before 5 April 2023 and any P45s you have. **Don't hold onto them until you send your accounting records.**

PENSIONS:

For the year to 5 April 2023, please list any **payments you've made** into a Pension Policy that you have and please send in any paperwork – look through your bank statements if you're in any doubt, or ring your pension company, who will send you a certificate of what you paid. Tick if this pension started before July 1988.

Company	Policy No	Amount paid in 2022/23	Policy began pre July 1988
			<input type="checkbox"/>
			<input type="checkbox"/>

Charity Donations (Gift Aid) Yes No

If yes - Please list the UK registered charities where donations have been gift aided, and how much.

Capital Gains in the year to 5 April 2023. Yes No

Have you sold, given away or disposed of any personal or business assets with a gain/profit of more than £12,300. If yes, give details and we'll tell you if it should be chargeable.

Investments into Cryptocurrency or Gold and Silver. Yes No

Please supply the transactions report. Preferably digitally in Excel/Spreadsheet format

Marital Status Married/Single/Separated/Divorced/Widowed/Civil Partnered/Living as Married (ring one),

please give the date your status last changed.....

and the full name of the spouse/partner/ex.....

Marriage Allowance Yes No

If you think you are eligible to claim or are already claiming, please indicate above. Please note neither you nor your spouse/civil partner can be a higher rate tax payer to claim this.

Student Loans If you had a student loan outstanding at 5 April 2023, let us know:

Date of Graduation..... Approximate amount owing at 5 April 2023.....

Amount of any repayments made directly to Student Loan Company during the 2022/23 year.....