2026 TAX RETURN: INFORMATION FOR THE YEAR 06/04/2025 TO 05/04/2026

YOUR NAME: **Email:**

INCOME: In the year to 5 April 2026, 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 2025/26 whose income is in excess of £60,000? ☐ 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 2025 to 5 April 2026 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 2026 P60 (now or when you get it) **as well as the last payslip** before 5 April 2026 and any P45s you have. **Don't hold onto them until you send your accounting records.**

PENSIONS:

For the year to 5 April 2026, 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/life insurance 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 2025/26	Policy began pre July 1988?

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 2026. ☐ Yes ☐ No

Have you sold, given away or disposed of any personal or business assets with a gain/profit of more than £3,000. 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

This is only applicable to couples where one has taxable income less than the tax free Personal Allowance of £12,570 net assessable to tax and the other is not a higher rate taxpayer. Please bear in mind that this must be declared in both tax returns, or if your spouse/ civil partner is employed, they will need to contact HMRC.

Student Loans If you had a student loan outstanding at 5 April 2026, download the most recent statement or let us know:

Date of Graduation…… Approximate amount owing at 5 April 2026……

Amount of any repayments made directly to Student Loan Company during the 2025/26 year……..

Class 2 National Insurance Contributions : Only applicable for people earning under £6,845 net profit. Do you wish to voluntarily contribute (£185.50 for the year) in order to get a qualifying year for your state pension? ☐ Yes ☐ No