

**MAAP's Personal Self Assessment Tax Return Information Checklist**

Start of Tax Year **06 April 2017**  
End of Tax year **05 April 2018**

Please complete this form so that we can prepare your personal tax return ahead of the 31st January 2018 filing deadline.  
We shall rely entirely upon the information you provide us to prepare your personal tax return.  
So it is important you double check you have entered all the information correctly and accurately.  
The list of information we ask for is not exhaustive. If you have any doubts over any of the points raised please call us on 01202 482121.  
Please make sure you inform us of any overseas bank accounts or assets you may operate or own respectively.

**CONFIRMATION OF YOUR PERSONAL DETAILS**

Your first name(s)			
Your last name			
Your UTR (10 digits)			
Your N.I. number			
Your residential address			
Your postcode			
Spouse's name		Spouse's Date of Birth	

**Confirmation of your Payments On Account (POA) made to the HMRC relevant to the tax year under review**

Please state how much you paid the HMRC in respect of the POA due in January 2017

Please state how much you paid the HMRC in respect of the POA due in July 2017

*If no payments were made, enter £0.00*

**EMPLOYMENT HISTORY**

Were you employed during the tax year under review?

If yes, please confirm the number of P60's you are attaching to this firm

Alternatively, for each employment, please give the following details

Employer's name			
Employer's Payroll Reference			
Gross pay received in tax year			
Income Tax deducted in tax year			
Employer's name			
Employer's Payroll Reference			
Gross pay received in tax year			
Income Tax deducted in tax year			

Did you receive any Benefits in Kind or expense payments from your employer(s)?

If 'YES' please attach a copy of the P11D statement your employer should have given you.

Did any major changes occur in the year (e.g. redundancy or retirement)?

If 'YES', please give brief details of the change and any additional payments made to you in compensation.

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### OTHER EARNED INCOME

Were you engaged in any self employed (including partnership) activities during the tax year for profit or loss?  
Did you receive any expenses or remuneration from any sports or social clubs you may be involved in?

Y / N

*If 'YES' please provide details unless this firm already prepares accounts for the activity involved.*

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### INCOME FROM PROPERTIES

Did you receive any income from any properties you own here or abroad?

Y / N

*If 'YES' please provide details unless you have already forwarded the details of income and allowable expenditure to this firm.*

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### INCOME FROM PENSIONS

Did you receive any income from a pension fund during the year?

Y / N

*If 'YES' please provide the P60 you should have received from the pension provider.*

Did you receive state pension during the year?

Y / N

If 'YES', please record the State Pension you received during the year

£

Please also state the amount your spouse received as state pension

£

*There may be an opportunity to set-off unsued personal allowances if you are of retirement age*

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### OTHER STATE BENEFITS RECEIVED

Did you receive any state benefits such as carer's or job seekers allowances during the year?

Y / N

*If 'YES' please provide details of the payments received*

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### INVESTMENT INCOME RECEIVED

Did you receive any savings account interest during the year?

Y / N

*If 'YES' please provide details of the investment interest received during the year, even if the payments only amount to a few pence*

Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

Bank or Building Society name   
Account number   
**NET** interest received   
Income Tax deducted at source  Was the account in joint names? If so, how many?

Bank or Building Society name   
Account number   
**NET** interest received   
Income Tax deducted at source  Was the account in joint names? If so, how many?

Bank or Building Society name   
Account number   
**NET** interest received   
Income Tax deducted at source  Was the account in joint names? If so, how many?

Bank or Building Society name   
Account number   
**NET** interest received   
Income Tax deducted at source  Was the account in joint names? If so, how many?

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### INCOME FROM STOCKS AND SHARES

Did you receive any income of stock issues from the shares you held during the year?  Y / N

*If 'YES' please provide details of the investment income your received during the year*

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### RELIEFS AND ALLOWABLE DEDUCTIONS AGAINST TAXABLE INCOME

Did you have any loans you believe may qualify for tax relief?  Y / N

*If 'YES' please provide details of the loan and the interest paid during the year*

Did you personally pay into any pension fund during the year?  Y / N

*If 'YES' please provide details of the Pension fund and the gross or net payments made during the year*

Did you make any Gift Aid payments or any covenants during the year?  Y / N

*If 'YES' please provide details of the payments made during the year*

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**CAPITAL GAINS**

Did you buy, sell or give away any assets subject to Capital Gains Tax regulations?

Y / N

*If 'YES' please provide details of the purchase or disposals made during the year*

Did you personally pay into any pension fund during the year?

Y / N

*If 'YES' please provide details of the Pension fund and the gross or net payments made during the year*

Did you make any Gift Aid payments or any covenants during the year?

Y / N

*If 'YES' please provide details of the payments made during the year*

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