

..... (Please enter your name)

**TAX RETURN INFORMATION  
YEAR TO 5 APRIL 2023**



Please tick appropriate boxes

		Enclosed	Not applicable
1	<b>Self Employed Income</b> - accounting records, income & expenditure details and supporting documents - payslips and end of year certificates regarding income received under the Construction Industry Scheme		
2	<b>Employment Income, Expenses Claims &amp; Benefits</b> - payslips and form P60 from your employer and/or form P45 from previous employer - details of termination payments ( <u>redundancy</u> ) - form P11D from your employer, together with details of any expenses and allowances received (such as mileage allowance) - details of professional subscriptions (work-related) – name of organisation & amount paid		
3	<b>Company Share Options</b> - details of all share schemes in which you are a participator - share option awards granted - share options exercised		
4	<b>Income from Land &amp; Property</b> - income & expenditure details - letting agent statements - certificates of mortgage interest paid - lease premiums received		
5	<b>Interest Received</b> - certificates, statements or passbooks showing interest received - include all accounts opened and closed in the year, with relevant dates		
6	<b>State Pension</b> - the amount received, including any lump sum payments, also forwarding a copy of the DWP notification of weekly rate statement		
7	<b>Pensions &amp; Annuities</b> - P60 tax certificates of pensions received		
8	<b>Dividends</b> - vouchers in respect of dividends received on UK and foreign shares, stocks, warrants and other securities - end of year consolidated tax packs for managed portfolios		
9	<b>Foreign Income &amp; Gains</b> - income & chargeable gains from overseas sources (whether remitted or not to the UK) - details of overseas assets & remittances to the UK - copies of tax returns filed in other jurisdictions, together with relevant tax assessments		
10	<b>Other Income</b> - new sources of income - income from trusts & estates (please forward copies of forms R185) - state benefits - compensation, including interest received on mis-sold financial products such as PPI claims - withdrawals from investment bonds (please forward copies of chargeable events certificates where applicable)		
11	<b>Pre-Owned Asset Tax</b> - do you continue to benefit from any assets that you have given away, or enjoy the use of assets which were purchased from cash gifts you previously made?		
12	<b>Child Benefit</b> - details of the 4-weekly child benefit payments received by either yourself or your partner, together with a note of the number of qualifying children the benefit is received for - please tick this box if your income was higher than your partner's (couples only)	<input type="checkbox"/>	

Please tick appropriate boxes

		Enclosed	Not applicable
13	<b>Pension contributions</b> Details of payments made to: - personal pensions, retirement annuities, occupational schemes, and superannuation schemes (please provide details of employee and employer/salary sacrifice contributions) <b>Please forward copies of annual allowance pension statements for the year ended 5 April 2023, as issued by the pension scheme administrators</b>		
14	<b>Gift Aid Donations</b> - the name of the charity - the amount paid and effective date		
15	<b>Student Loan Repayments</b> - please tick this box if you are liable to make Student Loan repayments, advising which Plan you are on (e.g., Plan 1 or 2 etc.) - amounts repaid in the year via your salary - please forward a copy of your latest student loan statement	<input type="checkbox"/>	
16	<b>Qualifying Loans</b> - interest paid on qualifying business loans (please provide copies of loan interest certificates)		
17	<b>Share Subscriptions</b> - subscriptions to Venture Capital Trusts, Enterprise Investment Schemes and Seed Enterprise Investment Schemes, <b>forwarding copies of the relevant investor tax certificates</b>		
18	<b>Capital Gains</b> - acquisitions and disposals (by way of sale or gift) of chargeable assets, such as shares, land and property etc. - details of cryptocurrency transactions - broker contract notes for purchases & sales of stocks and shares. - as regards disposals, details of when the asset was purchased and its original cost - details of shares disposed of and repurchased within 30 days - end of year capital gains tax reports for managed portfolios		
19	<b>Inheritance Tax</b> - details of all lifetime gifts made, including to individuals and trusts - details of IHT financial planning that is in place		
20	<b>Marriage Allowance</b> - If either spouse's income falls below £12,570, it may be possible to transfer £1,260 of the personal allowance to the other spouse (basic rate taxpayers only). Please tick here if you feel that this may be applicable.	<input type="checkbox"/>	
21	<b>Residence &amp; Domicile</b> - Are you resident and/or domiciled outside the UK for tax purposes? (If necessary, contact us for further information) - If previously non-UK resident, please confirm the date you moved to the UK - where non-domiciled, have you previously made elections for the remittance basis of taxation to apply? - if non-UK resident, please provide the dates you were in the UK		
22	<b>HMRC documents</b> Please forward: - tax code notices for 2022/23 & 2023/24 - self assessment statements of account - details of time-to-pay arrangements that are in place		
23	<b>Contact details</b> - daytime telephone number - mobile phone number - e-mail address		
24	<b>WW Group Services</b> - Would you like to be contacted in regard to the following services offered by Ward Williams (delete as appropriate):  Will Writing Probate & Estate Administration Trusts Tax Planning IHT Planning	Yes / No Yes / No Yes / No Yes / No	