



Personal Tax Checklist 2022/23

Self-assessment Registration

Forename	
Surname	
Prior surname and date changed (if applicable)	
Address (if unknown by us)	
Date of Birth	
National Insurance Number	
Unique Tax Reference	
Date you moved into current address	
Any foreign income?	
Any UK property income?	

Income information and type of document(s) required (if applicable) for first tax year we will submit – 2022/23 (6th April 2022 to 5th April 2023). If you cannot locate these documents, please give details below.

<p><u>Employment Income:</u></p> <ul style="list-style-type: none"> • P60 or P45 • March 2023 Payslip 	
<p><u>Benefits in Kind and Expenses:</u></p> <ul style="list-style-type: none"> • P11D • Any other supporting documentation 	
<p><u>Interest – UK and Foreign:</u></p> <p>Please provide details of all interest from bank accounts (no matter how small). Note that ISA interest does not need to be reported.</p> <ul style="list-style-type: none"> • Interest certificates • Investment portfolios • R185 certificates for CT61 interest 	
<p><u>Dividends – UK and Foreign:</u></p> <ul style="list-style-type: none"> • Dividend vouchers • Investment portfolios 	
<p><u>Self Employment:</u></p> <p>All details of income and expenditure relating to the 2022/23 tax year or to your year-end within the 2022/23 tax year.</p>	
<p><u>Pension income (to include personal pension income and state pension):</u></p> <ul style="list-style-type: none"> • P60s • Statements 	
<p><u>Rental income and Foreign property income:</u></p> <ul style="list-style-type: none"> • All details of rental income and expenditure • Buy-to-let mortgage statement, detailing the interest paid during 2022/23. 	

<p><u>Gains on Life Assurance Policies and chargeable events:</u></p> <ul style="list-style-type: none"> • Certificate(s) 	
<p><u>Share Schemes</u></p> <ul style="list-style-type: none"> • Any share options acquired. • Employee Management Incentives (EMI), Save As You Earn (SAYE) and Company Share Option Plan (CSOP). • Employee Shareholder. 	
<p><u>Child benefit</u></p> <ul style="list-style-type: none"> • No of children • Amount of child benefit received • When did this start? 	

Further elements to the tax return:

<p><u>Pension Contributions made:</u></p> <p>The March 2023 payslip (however, please retain all other payslips).</p> <ul style="list-style-type: none"> • Details of whether the pension contributions are Relief at Source (RAS) or Net Pay Arrangements (NPA). • Details of additional employer contributions. 	
<p><u>Charitable donations/gift aid</u></p> <ul style="list-style-type: none"> • Amount donated and details of where this was donated to. • When making the donation, did you claim gift aid? 	
<p><u>Business Investments</u></p> <ul style="list-style-type: none"> • EIS, SEIS, VCT and SISR Certificates 	

Any other information:

<u>Student loan details:</u> <ul style="list-style-type: none">• Which plan are you on?• Do you expect to pay this off soon?	
<u>Up to date bank details for any repayment that may be due to you.</u>	
<u>Tax code notices.</u>	
<u>Any taxable state benefits:</u> <ul style="list-style-type: none">• This includes the Jobseekers Allowance (JSA).	
<u>Any other information that is relevant to your personal tax return circumstances.</u>	

If you have any other types of income, please get in touch with us (this includes but is not limited to distributions from a trust and income from an estate).