

Here's your handy TLC tax return checklist!

2019-20



We get it, putting together the paperwork for self assessment is boring and it's easy to forget something. We can't help with the boring bit, but we can make life easier by suggesting you follow this checklist. Everything you supply needs to relate to dates between 6th April 2019 to 5th April 2020.

If we look after your company we will have on file already your company P60/P11d/dividends.

| EARNED INCOME | |
|--|--|
| Employment/Pensions | |
| Forms P60/P45 | |
| Form P11D (please advise of any benefits not included on P11D) | |
| Pension form P60/P45 | |
| State pension | |
| Sole Trader | |
| Accounting books / records | |
| Self-employed sick pay/unemployment benefit | |

| INVESTMENT AND OTHER INCOME | |
|---|--|
| Interest received from | |
| Banks / Building societies (If you have multiple accounts please list below) | |
| Dividends | |
| UK companies / Foreign companies / Unit trusts | |
| Land and property (rental income) | |
| Rents / Ground rents / Holiday lettings | |
| Lodgers / Rent a room | |
| Use of home spreadsheet | |

| CAPITAL TRANSACTIONS | |
|---|--|
| Disposal / acquisition of assets | |
| Property and land | |
| Stocks and shares | |
| SEIS/EIS/VCT investments | |

| OUTGOINGS & EXPENSES | |
|---|--|
| Interest paid on loans | |
| To acquire company shares or loan to your business | |
| Charitable donations, etc under the formal schemes e.g. Gift Aid | |
| Amounts paid | |
| Pension scheme contributions | |
| Amount paid by you into your pension | |
| Amount paid in by an employer/company | |
| Expenses incurred re. land & property (rental income) | |
| Mortgage interest / Insurance / Repairs | |
| Expenses in employment | |
| Professional subscriptions | |
| Mileage at less than 45p per mile | |
| Expenses as sole trader | |
| Stock / Use of home / Employee / Tel. / Mileage etc | |
| Student loan | |
| Student loan repayment etc | |
| Child benefit | |
| Amounts received if you earn over £50,000 pa | |
| Marriage allowance | |
| If your spouse has income of less than £12,500 please let us know | |

Please add any additional information, change or circumstance details or general comments here, or attach additional sheets...

NEED A HAND?

Give us a call with any problems on **01937 534505** and don't forget our address is **Parkhill Studio, Walton Road, Wetherby, LS22 5DZ**

www.tlccountants.com

 Tax Advisers
& Accountants