

P11D CHECKLIST For the tax year 2017/18

P11D(b) and P11D forms must be filed by 6th July 2018

Please complete this checklist with the relevant details for the tax year running from
6th April 2017 to 5th April 2018.

Please provide copy documents and any other information you have to support the
amounts entered on the form.

Please return this completed form and any information to the team at Churchmill by
Friday 20th April 2018 to guarantee completion by the deadline.

By post to:
Churchmill Partnership Ltd
Brook House
Mint Street
Godalming
Surrey
GU7 1HE

By email to:
office@churchmillpartnership.co.uk

BUSINESS DETAILS

Business Name:.....

Name of Director / Employee:.....

Annual Salary: £

If you answer 'yes' to any of the questions below, we will contact you for further details to assess whether there is a reportable benefit in kind.

A ASSETS TRANSFERRED

CARS, PROPERTY, GOODS OR OTHER ASSETS

Has ownership of any business asset(s) been transferred to the Director / Employee during the tax year?

YES NO

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B PAYMENTS MADE ON BEHALF OF EMPLOYEE

Has the business made any payments on behalf of the Director / Employee where the contract is in the Director's / Employee's own name during the tax year?

YES NO

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Examples include: Telephone, Broadband, Private Medical Cover in personal names, Credit Card Bills, Rent paid by the business where the contract is in the individual's name.

C VOUCHERS AND CREDIT CARDS

Does the Director / Employee receive any vouchers from the business?

YES NO

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Please include the nature of the voucher, for example gift vouchers, childcare vouchers

Does the Director / Employee have use of a business credit card for personal expenditure?

YES NO

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D LIVING ACCOMMODATION

Do you provide living accommodation for the Director / Employee or members of their family or household?

YES NO

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E MILEAGE ALLOWANCE AND PASSENGER PAYMENTS

Do you pay mileage allowance to the Director / Employee for business travel in their own vehicle (above the statutory allowances)?

YES NO

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F CAR AND CAR FUEL

Do you provide a company car (owned or leased by the business) for the Director / Employee which is available for private use?

YES NO

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Please provide details of the vehicle, eg make, model, registration number:

Is fuel provided by the business?

YES NO

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Does the Director / Employee make any monetary contribution towards the car or fuel for private use?
If so, how much?

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G VANS AND VAN FUEL

Do you provide a van (owned or leased by the business) for the Director / Employee which is available for private use?

YES NO

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Please provide details of the vehicle, eg make, model, registration number:

Is fuel provided by the business?

YES NO

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Does the Director / Employee make any monetary contribution towards the van or fuel for private use?

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H	INTEREST FREE AND LOW INTEREST LOANS	YES	NO
	Have you provided interest free or low interest loans to the Director / Employee in excess of £10,000 at any point in the tax year?		

Please note that an overdrawn Director's Loan Account balance may need to be included here.

I	PRIVATE MEDICAL TREATMENT OR INSURANCE	YES	NO
	Have you paid for private medical treatment or insurance for the Director / Employee during the tax year?		

This includes private medical and dental treatment and insurance and may also include eye tests. Please note that we need to know if the medical policy is a company policy or an individual policy in the Director / Employee name that the company pays for.

J	QUALIFYING RELOCATION EXPENSES PAYMENTS AND BENEFITS	YES	NO
	Have you paid any relocation expenses to the Director / Employee in the tax year?		

K	SERVICES SUPPLIED	YES	NO
	Have you provided goods or services to the Director / Employee in the tax year at a discount?		

L	ASSETS PLACED AT THE EMPLOYEE'S DISPOSAL	YES	NO
	Have you allowed the business assets to be placed at the Director's / Employee's disposal for personal use in the tax year?		

Examples include computers, mobile phones, smart phones or Corporate Hospitality Boxes or tickets.

M	OTHER ITEMS	YES	NO
	Have you provided any other benefits to the Director / Employee in the tax year?		

Examples include subscriptions (professional or otherwise), gym membership, golf or sports club membership, Christmas parties and social events above allowed limits, working lunches (not subsistence), clothing (not uniforms), nursery places not via childcare voucher schemes, paying for personal holidays or an extension or conservatory at home.

Please contact us if you are unsure and we can look into this for you.

N	EXPENSES PAYMENTS
	<p><i>Business expenses made to, or on behalf of, the Director / Employee are no longer reportable on the condition that there is an adequate system of review and approval of expenses in place within the business to make sure the expenses have been genuinely paid by the Director / Employee and that a deduction would otherwise be available. The second condition is that neither the payer nor anyone operating the system knows or suspects, or could reasonably be expected to know or suspect, that the Director / Employee has not incurred and paid an amount in respect of the expenses or that a deduction would not be available for the expenses.</i></p>

Thank you for taking the time to complete this form. Please contact us if you have any questions. We will be in touch with your P11D(b) and P11D forms as soon as we can.

The Churchmill Team