

INCOME TAX CHECKLIST

For the tax year 2017/18

Tax returns must be filed by 31 January 2019

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

Please provide any supplementary information / copy documents you feel may be useful to support the amounts entered on the form.

Please return this completed form and any information to the team at Churchmill by 31st October 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 Or upload to IRIS Open Space to share with us electronically: https://www.irisopenspace.co.uk/
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PERSONAL DETAILS	
Name	
Address	Telephone
	UTR:
	NI number:
	Date of birth:

SECTION A: INCOME

If you have income from a sole trade or partnership business please provide accounting records so that we may compute the trading profits

Name of business	Year end

Employment income – please provide copy of P60 / P45 and P11D (if applicable) for 2017/18 for each employment

Name of employer	Tax (per P60 / P45)	Gross (per P60 / P45)

Name of employer	Taxable benefit in kind (per P11D)	Taxable benefit value (per P11D)

Pension and similar income – please provide copy of correspondence or P60 for 2017/18 for each source of income

Do you receive any UK state benefits or state pension between 6th April 2017 and 5th April 2018?

	Amount received in the tax year
State Benefits	
State pension	

Other pensions and retirement annuities:

Name of pension / annuity provider	Tax (per P60 / P45)	Gross (per P60 / P45)

Interest – UK

Interest from banks, building societies and other deposit takers

Bank / Building Society	Bank Account Description & Number	Amount received in the tax year

Dividends – UK

Shares in company	Description & number of shares	Amount

Other investment income – UK

Source	Description & number of shares / units	Net	Tax	Gross

Interest – Foreign

Interest from banks, building societies and other deposit takers

Bank / Building Society	Bank Account Description & Number	Net	Tax	Gross

Dividends – Foreign

Shares in company	Description & number of shares / units	Net	Tax	Gross

Other investment income – Foreign

Source	Description & number of shares / units	Net	Tax	Gross

Any other foreign income

Source	Description & number of shares / units	Net	Tax	Gross

Land and Property

Income and expenses from property that you own.

PLEASE PROVIDE THE SAME DETAILS FOR ANY FURTHER PROPERTIES YOU OWN AND LET

Property details

Address:			
Unfurnished or Furnished Let?		Furnished Holiday Let	Yes / No (delete as applicable)
Is this property jointly owned?	Yes / No (delete as applicable)	Is this property jointly let?	Yes / No (delete as applicable)
If 'yes', please provide your percentage share:%		If 'yes', please provide your percentage share:%	

Details of Income and Expenditure

Please give us the total (100%) of income and expenditure from 6th April 2017 to 5th April 2018

Income:	Amount £
Rent	
Other income	
Expenses:	
Letting fees	
Rates / Council Tax	
Electricity / gas	
Insurance	
Repairs	<i>Please provide details</i>
Maintenance (including service charges)	<i>Please provide details</i>
Ground rent	
Management	<i>Please provide details</i>
Accountancy costs	
Legal fees	<i>Please provide details</i>
Other	<i>Please provide details</i>
Mortgage interest	<i>capital repayment is not deductible for tax</i>
<p>From April 2020, tax relief for finance costs (mortgage interest) will be restricted to the basic rate of income tax (currently 20%). Relief will be given as a reduction to the tax liability rather than a reduction to taxable rental income. This change is being phased in from 2017/18 to 2020/21. For 2017/18, this means 75% of the finance cost will be deductible from taxable rental income and 25% available for tax relief in the form of a tax credit. Please speak to us if you need help to understand the impact for you.</p>	

SECTION B: RELIEFS

Personal pension contributions

Please provide details of personal and employer / company contributions if you need us to check your situation with the annual allowance available for tax relief:

Personal pension contributions	Date paid	Amount

Employer pension contributions	Date paid	Amount

Charitable gifts - Gift Aid to UK charities:

Charity name and number	Date paid	Amount of donation in tax year

SECTION C: ALLOWANCES

<i>Please let us know if your marital status has recently changed and include the date at which your status changed.</i>	
Marital status	Date of change

SECTION D: OTHER ITEMS

<i>Please let us know if you or your partner received child benefit in the tax year. If you or your partner's income is over £50,000 in the tax year, you may have a 'high income child benefit charge' to pay via your tax return</i>	
Enter the total amount of Child Benefit received by you and your partner	
Enter the number of children you and your partner received Child Benefit for	
If applicable, enter the date on which you started or stopped receiving Child Benefit payments in the tax year	

SECTION E: ADDITIONAL INFORMATION

Please enter below any other information concerning your personal situation, income, reliefs, allowances or capital gains which you feel may be relevant to your Income Tax Return.

Please enter 'NONE' if there are no such items.

Examples of relevant information:

- *You have sold a property that you believe may not be covered by Principal Private Residence Relief in the tax year*
- *You have received a PPI or similar reclaim and associated compensation and interest payment*
- *You are a beneficiary of a trust or estate and you are not sure if there are tax implications*
- *You have received income from a trust or estate and you are not sure of the tax implications*
- *You do not live in the UK and require information concerning your UK residency status for tax purposes and domicile status in the UK should you feel this is relevant*

If you have any other information you feel may impact on your tax return or any income or reliefs not mentioned above that you feel may need to be included within your tax return please provide information and we will contact you to discuss this further.

Thank you for taking the time to complete this form.

We will be in touch with your draft tax return as soon as we can.

The Churchmill Team