



## Tax Return Checklist

Please read through this list to check that all relevant income is being reported on your tax return.

### Employment income

- Forms P60, P11D, P45, PAYE coding notices
- Professional subscriptions and other expenses of employment paid personally

### Self-employment income

- Earned income and any expenses incurred

### Capital Gains

- Assets acquired, sold or which have become of negligible value
- 'Windfall' receipts from building societies /insurance companies
- Sales of shares acquired under Company share options

### Income from land & property

- Income from let property and related expenses (including rent-a-room scheme)

### Investment income

- Bank and building society interest received (even if only a small amount of interest was credited to, say your current account, this should be disclosed as it may prevent a subsequent Revenue enquiry)
- Dividend counterfoils including stock dividends, unit trusts and real estate investment trust distributions
- Stockbroker end of year report showing income and transactions
- Other interest received including Government loan stock
- Chargeable event certificates from investment bonds

### Overseas income

- Income from savings and investments abroad e.g. bank accounts, holiday villas and shares

### Other income

- Child benefit received if either you or your partner have gross income of more than £50,000
- Pensions received both state and other
- Jobseekers' Allowance and other state benefits
- Commissions, fees, tips etc. received
- Company share options granted or exercised
- Income from trusts, settlements and estates
- Income received by minor children from funds provided by parent

### Student loan

- Are you liable to make student loan repayments?