

Sandison Lang: Checklist of information required

For the year ended 5th April 2018

Please let us have your information **NO LATER THAN 15 NOVEMBER 2018** to ensure your tax return will be filed on time.

INCOME TAX RETURN - 6th April 2017 to 5th April 2018

Original documents are required, not photocopies

Please tick where applicable

- | | | |
|----|---|--------------------------|
| 1 | Tax Return form or the "Notice to Complete a Tax Return" | <input type="checkbox"/> |
| 2 | Forms P60 relating to all employments. | <input type="checkbox"/> |
| 3 | Details of professional subscriptions paid. | <input type="checkbox"/> |
| 4 | Form P60 from NHS Pension Scheme and other pension providers. | <input type="checkbox"/> |
| 5 | Notices of PAYE code number - Form P2. | <input type="checkbox"/> |
| 6 | Payslips covering lecture fees and other fees that have had tax deducted at source and have not been included in P60. | <input type="checkbox"/> |
| 7 | Form P11D setting out taxable benefits e.g. mileage benefit. | <input type="checkbox"/> |
| 8 | Details of state pension, either weekly or 4-weekly amounts received. | <input type="checkbox"/> |
| 9 | Interest certificates from banks and building societies for all interest-bearing accounts held during the year.
(Obtainable from banks/building societies) | <input type="checkbox"/> |
| 10 | Dividend counterfoils and related vouchers. | <input type="checkbox"/> |
| 11 | Foreign income e.g. interest and dividends with details of country of origin. | <input type="checkbox"/> |
| 12 | Details of National Savings Bank interest with supporting vouchers. | <input type="checkbox"/> |
| 13 | Details of other untaxed interest received such as War Loans etc. | <input type="checkbox"/> |
| 14 | Full details of Estate/Trust income with Form R185's where applicable. | <input type="checkbox"/> |
| 15 | Details of any rents received and all property related expenses incurred. | <input type="checkbox"/> |
| 16 | Chargeable event certificates for redemption of life insurance policies. | <input type="checkbox"/> |
| 17 | Details of deeds of covenant to charities and gift aid payments, to include date of deed and the net amounts paid. | <input type="checkbox"/> |
| 18 | Marital status and dates of changes. | <input type="checkbox"/> |
| 19 | Blind person's allowance - give date of registration and local authority. | <input type="checkbox"/> |
| 20 | Details of retirement annuity policies and personal pension schemes to include certificates, PPCC's, for all new policies and receipts for additional contributions. Give details of lapsed policies. | <input type="checkbox"/> |
| 21 | Full details of disposal of shares and property together with contract notes, plus full details of acquisition and costs of these disposals. | <input type="checkbox"/> |
| 22 | Child Benefit, number of children and weekly amount received. If cancelled during the year, please provide date. | <input type="checkbox"/> |
| 23 | NHS Pension Scheme - Annual Allowance Pensions Savings Statement
(You will need to contact NHS BSA to obtain this, or contact us if you would like help with this) | <input type="checkbox"/> |

Please provide details of any change in email addresses as soon as possible to avoid delays in filing your Tax Returns.

PTO

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For the year ended 5th April 2018

Private Practice Accounts

(NB: Your year end may not be 5th April)

Please tick where applicable

- | | | |
|----------|---|--------------------------|
| 1 | Details of all untaxed fees including:- | |
| | a) BUPA/BMI Partnership Award | <input type="checkbox"/> |
| | b) Lecture Fees | <input type="checkbox"/> |
| | c) Cremation Fees. | <input type="checkbox"/> |
| | d) Locum and Agency work. | <input type="checkbox"/> |
| 2 | Details of Private Practice income and expenses, which should include:- | |
| | a) Accounts book, listing income received and expenses paid. | <input type="checkbox"/> |
| | Total of invoices issued. | <input type="checkbox"/> |
| | Work-in-progress outstanding at year end. | <input type="checkbox"/> |
| | Invoices remaining unpaid at year end. | <input type="checkbox"/> |
| | List of bad debts written-off in the year. | <input type="checkbox"/> |
| | Bank statements. | <input type="checkbox"/> |
| | Cheque book stubs. | <input type="checkbox"/> |
| | Paying-in book counterfoils. | <input type="checkbox"/> |
| | b) Full details of all business expenses incurred with relevant invoices/receipts. | <input type="checkbox"/> |
| | c) Details of any reimbursements received for expenses incurred. | <input type="checkbox"/> |
| | d) Full details of motor running expenses to include:- | |
| | Petrol/diesel. | <input type="checkbox"/> |
| | Road fund licence. | <input type="checkbox"/> |
| | Insurance. | <input type="checkbox"/> |
| | Maintenance, repairs and servicing costs. | <input type="checkbox"/> |
| | Hire purchase interest. | <input type="checkbox"/> |
| | e) Total of annual mileage and the percentage of that total which relates to Private Practice, NHS, domestic and please provide typical weekly mileage log. | <input type="checkbox"/> |
| | f) Details of car changes with invoices and part-exchange/sale details of previous car. Include details of CO ² emissions of the new car. | <input type="checkbox"/> |
| | g) Use of home. Confirmation of number of hours worked at home per month. | <input type="checkbox"/> |
| 3 | New Partnerships | |
| | Please let us have a copy of the Partnership Deed within 3 months of commencement. | <input type="checkbox"/> |

Please remember that:

- a) evidence of income and receipts for expenses claimed may be required at a future date.
- b) records have to be retained for 6 years.