

## Sandison Lang: Checklist of information required

For the year ended 5th April 2019

Please let us have your information **NO LATER THAN 31st OCTOBER 2019** to ensure your tax return will be filed on time.

### INCOME TAX RETURN - 6th April 2018 to 5th April 2019

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.<br>(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<br>(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

# Sandison Lang: Checklist of information required

For the year ended 5th April 2019

## 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 <sup>2</sup> 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 | <b>New Partnerships</b>   |                          |
|   | 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.