

Sandison Lang: Checklist of information required

For the year ended 5th April 2024

Please let us have your information **NO LATER THAN 31st OCTOBER 2024** to ensure your tax return will be filed on time.

INCOME TAX RETURN - 6th April 2023 to 5th April 2024

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 | Student Loan – type of plan. | <input type="checkbox"/> |
| 24 | NHS Pension Scheme – Annual Allowance Pensions Savings Statement
(You will need to contact NHS BSA to obtain this - 0300 330 1346 or nhsbsa.pensionscanquery@nhs.net) | <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 2024

Private Practice Accounts

(NB: Your business year may not end at 5th April but tax records must now be filed in line with the tax year end date. Please provide the required information up to 31 March 2024/5 April 2024.)

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:

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