Sandison Lang: **Checklist of information required**

For the year ended 5th April 2026

If you file annual returns, please let us have your information **NO LATER THAN 31st OCTOBER 2026** to ensure your tax return will be filed on time.

If you file quarterly returns as part of Making Tax Digital, we would appreciate receiving your information **NO LATER THAN 30th JUNE 2026** so that your tax records roll on chronologically to the first MTD reporting period.

INCOME TAX RETURN - 6th April 2025 to 5th April 2026

		Please tick where applicable
1	Tax Return form or the "Notice to Complete a Tax Return"	☐
2	Forms P60 relating to all employments.	☐
3	Details of professional subscriptions paid.	☐
4	Form P60 from NHS Pension Scheme and other pension providers.	☐
5	Notices of PAYE code number - Form P2.	☐
6	Payslips covering lecture fees and other fees that have had tax deducted at source and have not been included in P60.	☐
7	Form P11D setting out taxable benefits e.g. mileage benefit.	☐
8	Details of state pension, either weekly or 4-weekly amounts received.	☐
9	Details of any winter fuel payment received.	☐
10	Interest certificates from banks and building societies for all interest-bearing accounts held during the year. (Obtainable from banks/building societies)	☐
11	Dividend counterfoils and related vouchers.	☐
12	Foreign income e.g. interest and dividends with details of country of origin.	☐
13	Details of National Savings Bank interest with supporting vouchers.	☐
14	Details of other untaxed interest received such as War Loans etc.	☐
15	Full details of Estate/Trust income with Form R185's where applicable.	☐
16	Details of any rents received and all property related expenses incurred.	☐
17	Chargeable event certificates for redemption of life insurance policies.	☐
18	Details of deeds of covenant to charities and gift aid payments, to include date of deed and the net amounts paid.	☐
19	Marital status and dates of changes.	☐
20	Blind person's allowance - give date of registration and local authority.	☐
21	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.	☐
22	Full details of disposal of shares and property together with contract notes, plus full details of acquisition and costs of these disposals.	☐
23	Child Benefit, number of children and weekly amount received. If cancelled during the year, please provide date.	☐
24	Student Loan – type of plan.	☐
25	**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)**	☐

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 2026

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 2026/5 April 2026.)

Please tick where applicable

1 Details of all untaxed fees including:-

- a) BUPA/BMI Partnership Award ☐
- b) Lecture Fees ☐
- c) Cremation Fees. ☐
- d) Locum and Agency work. ☐

2 Details of Private Practice income and expenses, which should include:-

- a) Accounts book, listing income received and expenses paid. ☐
  - Total of invoices issued. ☐
  - Work-in-progress outstanding at year end. ☐
  - Invoices remaining unpaid at year end. ☐
  - List of bad debts written-off in the year. ☐
  - Bank statements. ☐
  - Cheque book stubs. ☐
  - Paying-in book counterfoils. ☐
- b) Full details of all business expenses incurred with relevant invoices/receipts. ☐
- c) Details of any reimbursements received for expenses incurred. ☐
- d) Full details of motor running expenses to include:-
  - Petrol/diesel. ☐
  - Road fund licence. ☐
  - Insurance. ☐
  - Maintenance, repairs and servicing costs. ☐
  - Hire purchase interest. ☐
- 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.** ☐
- 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. ☐
- g) Use of home. Confirmation of number of hours worked at home per month. ☐

3 **New Partnerships**

Please let us have a copy of the Partnership Deed within 3 months of commencement. ☐

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.