

Please tell us if you have any of the following income or allowances for 6th April 2025 to 5th April 2026

Employment Income

If you have any employments please provide forms P60 and P11d in respect of each employment, with any relevant start and end dates. If you are liable to make Student Loan repayments please provide details.

Trading Income

If you have any self-employment income, please provide details and the accounts information for the trades.

Pension Income

If you were in receipt of a pension (other than a state pension) forms P60 in respect of each pension. If you started to receive a pension during the year please provide details of the date the pension payments commenced.

State Benefits Income

Please provide details of any State Pension, Widows State Pension or Social Security Benefits received in the year.

UK Interest

Details of any UK interest received, including bank name, account number.

National Savings Interest

Details of any National Savings interest received.

Other UK Interest Paid Gross

Details of any other UK investment income received without the deduction of basic rate tax.

UK Investment Income

Certificates of net Income or dividend vouchers for any investments.

UK Unit Trust Interest Paid Gross

Details of any interest from Unit Trusts received without the deduction of basic rate tax.

Income from UK Property

Details of any income received and any expenses incurred in respect of any UK Rental property.

Income from Trusts

Forms R185 in respect of any Trust income received.

Income from Trusts Chargeable on Settlers

Forms R185 in respect of any Trust income chargeable on settlers.

Income from Estates

Forms R185 in respect of any Estate income received.

Foreign Pension Income

If you were in receipt of a foreign pension (other than a state pension) details of each pension including the country of origin, the gross amount and any tax deducted. If you started to receive a pension during the year please provide details of the date the pension payments commenced.

Foreign State Benefit Income

Details of the foreign state benefits received, including the country of origin, the gross amount and any tax deducted. If you started to receive or ceased to receive these during the year please provide the relevant dates.

Foreign Interest

Details of any interest received from foreign sources including the country of origin and details of any tax deducted.

Foreign Dividend Income

Details of any foreign dividends received including the country of origin and any tax credits, please provide dividend vouchers where possible.

Income from Foreign Property

Details of any income received and any expenses incurred including the country of origin and any foreign tax deducted in respect of any Foreign Rental property.

Income from Foreign Life Insurance Policies

Details of the life insurance gains received from foreign life insurance policies, including the country of origin and any notional tax paid.

Other Foreign Income

Details of other foreign income received including the type of income, country of origin and any tax deducted.

Lloyd's Income

If you were a Lloyd's name, details of any income and expenditure for the Lloyd's year ended 31 December 2025.

Other Income

Details of any Accrued income charges, accrued income reliefs, Category 'A' or Category 'B' income sources not included elsewhere.

Pension Contributions

Details of any Pension contributions paid during the year, please provide details of the provider, policy number and the amounts paid.

Tax charge on excess pension savings

It is possible to save as much as you want towards your pension but there is a limit on the value added to your pension fund that can receive tax relief each year. As this includes contributions made by your employer to both defined contributions and defined benefits schemes, it is important we understand what contributions are being made by your employer on your behalf as well as contributions being paid by you. If the limits are breached, a tax charge is due on the excess contributions. Please therefore confirm what pension provisions have been put in place with your employer and provide the latest annual statements and pension forecasts, showing both personal and employer contributions, in order that we can review the overall increase in pension savings for the year.

Charitable Donations

Details of any Gift Aid or Covenants to charity paid during the year.

EIS, VCT, SEIS and SISR Subscriptions

Details of any subscriptions to EIS, VCT, SEIS or SISR schemes paid during the year.

Allowances

List any allowances you are eligible to claim.

Child Benefit

If you were in receipt of child benefit payments, please provide the Name and Date of Birth for all eligible children as well as the total Child Benefit received during the year.

Residence

If you were treated as non-resident for the year, please provide details of any changes in your residence, remittance or domicile status, together with any details of any time

spent in the UK (please provide details of any days spent in the UK due to exceptional circumstances, or essential Coronavirus related work).

Tax Regime

Please confirm which Tax Payer Status you consider applies to you.

Rest of the UK (English / Northern Ireland) Scottish Tax Payer or Welsh Tax Payer.

Coronavirus Payments

If you received any Coronavirus related grants e.g. Self-Employed Income Support Scheme (SEISS) or Coronavirus Job Retention Scheme payments (CJRS) for Coronavirus, please provide details of the amounts received.

If you were a partner in a partnership and you received SEISS payments directly please confirm if these were retained by you personally or if they were added to partnership income.

Cryptoassets

Anyone with cryptoassets should declare any income or gains above the tax-free allowance on a tax return. Tax may be due when a person:

- receives cryptoassets from employment, if they're held as part of a trade, or are involved in crypto-related activities that generate an income
- sells or exchanges cryptoassets, including:
- selling cryptoassets for money
- exchanging one type of cryptoasset for another
- using cryptoassets to make purchases
- gifting cryptoassets to another person
- donating cryptoassets to charity

Any Other Details

If you have acquired or disposed of any shares, securities, unit trusts or any other assets (including land and property) by any method, (for instance inheritance, stock dividends, rights issues, gift, redemption, sale of rights etc), please let me have the details and any documentation that you hold.