



Tax Return Checklist

Send your information to us by 31 October to avoid late submission penalties.

Welcome to the Robinsons 2019 Tax Return Checklist.

This checklist is intended to help you gather the information you need for your tax return, and also think about whether there have been any changes to your circumstances.

We would urge everyone to send in tax information by 31 October, to avoid late submission penalties.


Information provided at the last minute may be incomplete and in some cases may mean that the correct amount of tax is not paid, which may lead to fines. Under the new Revenue penalty system they may say you are “negligent” if your return is missing any of the required information and consequently they may add a penalty to any tax due.

For this tax season we suggest you start to get all of your information together immediately after the tax year-ends on 5 April.

31 October is our advised latest due date for sending all of the relevant information to us for the previous tax year so that we can make sure the data is processed in good time. Information sent in after this date may not be processed.


April 2019: Main documents required for completing a tax return

a) Income and other receipts


Item	Action	Due date in this tax year	 Obtained
The tax year-end		5 April	
Interest received	Contact your bank or building society and obtain details of any interest on your own or joint account.	6 April	<input type="checkbox"/>
Dividends	Obtain details of all dividends received from 6 April to 5 April from all sources. This includes stock dividends if you have any.	6 April	<input type="checkbox"/>
Accounts/self employment *	If you have any self employment in the period, you will need to assemble your books and records for the period to 5 April.	6 April	<input type="checkbox"/>
Employment income	Relevant form P60 for the year-ended 5 April		<input type="checkbox"/>
Forms P11D	If you are employed and have benefits provided by the employer.	These forms P11D should be with you by 6 July each year.	<input type="checkbox"/>
Chargeable gains	Assemble details of disposals during the tax year. This may be obtained from your bank, broker or solicitor.		<input type="checkbox"/>
Rental income	Did you get any rent from another property? If you do receive rental income please provide us with the details for the period. The rules regarding deductions from rental income have changed considerably, but you should keep receipts of all deductions so that claims can be made where appropriate.		<input type="checkbox"/>

* Please note from 2019 all VAT registered traders with turnover above £85,000 must keep these records in digital format.

b) Payments and other deductions you can claim

Item	Action	Due date in this tax year	 Obtained
Pension contributions	If you have made pension contributions personally in the period, please contact your provider and have them send a confirmation of payments made.	This is normally available from your pension provider by 6 April each year.	<input type="checkbox"/>
Loan interest paid	If you are paying interest on a qualifying loan obtain the interest certificate from the bank.	This is normally available from your lender by 6 April each year.	<input type="checkbox"/>
Gift Aid payments made to Charities	Obtain details of payments made to registered charities in the period including their registered number.		<input type="checkbox"/>


c) Other income and information

Item	Action	Due date in this tax year	 Obtained
Second tax payment on account	Second payment on account due	31 July	<input type="checkbox"/>
High income child benefit charge	This is relevant if your income is over £50,000.		<input type="checkbox"/>
Student Loan repayments	If applicable please obtain details.		<input type="checkbox"/>

Please make a note of any one-off or regular payments / benefits or allowances you have received. We can then advise if they are taxable.

Please also let us know if your personal details have changed in the period.

d) Special Deductions

Item	Action	Obtained 
EIS/VCT Investments	Obtain details of subscriptions and EIS Forms from the Company Secretary. It is advisable to cross check EIS forms issued with the relevant company Annual Return on a regular basis to ensure the two correspond.	<input type="checkbox"/>
Other sources	You may have other sources of income such as Trust or Estates. Contact your solicitor or financial adviser for details.	<input type="checkbox"/>
Other loans	You may have qualifying loans for tax purposes. Please obtain these from your bank.	<input type="checkbox"/>

Notes

It is advisable to cross check EIS forms issued with the relevant company Annual Return on a regular basis to ensure the two correspond.

Please note we require all information to be received in our office by **31 October**. Information received after this date may cause the tax return to be processed late. You may incur a fine if your Return is submitted after the deadline of **31 January**.





Disclaimer

This booklet and the attached guides do not constitute tax advice – instead these are pointers designed to help you navigate your way through your tax affairs. You should not take any action – or refrain from any action – as a consequence of anything we discuss above. Special advice is required if considering taking a dividend. In addition investment advice may be required when investing in or deciding not to invest in a pension or when considering any financial investment of any kind. Robinsons Consulting Limited is not qualified to give investment advice.

Thank you for using our Tax Return checklist, we hope you found it useful.



If you have any queries about the information provided, large or small, please feel free to get in touch:

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