

Tax Return Checklist

- Bank interest for the year from all sources including income jointly held*
- Employment and summary of benefits in kind (P60, P45 & P11D)*
- Pensions received (P60)*
- State pensions and taxable benefit income*
- Self-Employed Income & Expenditure?*
- Dividends received for the year*
- Personal Pension contributions made in the year*
- Donations made to charity?*
- Income & Expenses from rented property/ies?*
- Income from foreign investments*
- Any Life Insurance Gains?*
- Income from Trusts?*
- Child benefit claimed in the year (Higher rate tax payers only)*
- Bought or sold any assets in the year?*
- Any other transactions which you think may be required to complete your tax return*

Cooper Curtis Accountants offer a complete Accounting and Tax service. With offices in Birmingham, Manchester and Warwick, our experienced staff are here to find solutions to your business problems.

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