

Self-Assessment Tax return Checklist / 2022-2023 Year

Please read and answer every question below for the tax year from 6 April 2022 to 5 April 2023.

Before you begin to prepare your income tax return, go through the following first.

Highlight the areas that apply to you, and make sure you have gathered all your payslips, receipts, and tax documentation. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder.

Please send us all the documents by email or by post to;

Taxlab
4 Glenfield
Livingston
West Lothian
EH54 7BG

For detailed guidance please click on the links below;

<https://www.gov.uk/self-assessment-tax-returns>

* Indicates required question

Deadlines and Payment dates (Please read)

This checklist details the information we may need from you to enable us to prepare your Self Assessment Tax Return for the year ended 5 April 2023.

We are aware that not all the information will be relevant for every client but in order for us to provide you with the best service we need to ensure we are not missing any information when we complete your Tax Return.

Deadlines and Payment Dates

It is always advisable to send us your paperwork as soon as possible. This will allow us to provide you with details of your potential upcoming tax payments in a timely manner. If you are due to make a tax payment in July 2022, it would also be beneficial to complete your Tax Return prior to this date so that we can advise accordingly.

31 July 2023 - 2nd payment on account for 2022/2023 due / Tax Credits Annual Declaration deadline

31 October 2023 - Deadline for submitting a paper tax return

31 December 2023 - Deadline if wishing to pay tax less than £3,000 through your tax code (if possible)

31 January 2024 - Deadline for submitting an electronic tax return / - Balancing payment for 2022/2023 due / 1st payment on account for 2022/2023 due

31 July 2024 - Deadline for payment of the second payment on account for the tax year 2023-2024

PERSONAL INFORMATION

1. Full Name *

2. Date of birth *

Example: 7 January 2019

3. Address *

4. National Insurance number *

5. Unique Taxpayer Reference number *

6. Mobile telephone number *

7. Are classed as Scottish Taxpayer or UK? *

Mark only one oval.

Scottish

UK

EMPLOYMENT INCOME

8. Did you receive any employment income for the year ended 5 April 2023? *

If Yes, then please send us your P60 or P45 forms for the tax year ended 5 April 2023 by email or post.

Mark only one oval.

Yes

No

9. P11Ds (Details of taxable benefits and expenses - medical insurance, company car, etc.) *

If Yes, please send copies of the P11D forms.

Mark only one oval.

Yes

No

10. Any PAYE coding notices for 2022/2023 received from the HMRC? *

If Yes, please send copies.

Mark only one oval.

Yes

No

11. Any deductible expenses (for example professional fees and subscriptions) *

If Yes, please send details of the expenses incurred.

Mark only one oval.

Yes

No

12. Did you have more than one employment? *

If yes, then please send us your P60 or P45 forms for all employments for the tax year ended 5 April 2023 by email or post.

Mark only one oval.

Yes

No

SELF-EMPLOYMENT OR PARTNERSHIP INCOME

13. Did you have any self-employment income in the year ended 5 April 2023? *

(Note: please ignore this section if we prepare your accounts from data already received). Please include acquisitions and/or disposals of business assets.

Mark only one oval.

Yes

No

14. Did you have partnership income in the year ended 5 April 2023? *

If yes, then please send us your business income and expenditure along with copies of the business bank accounts for the year ended 5 April 2023.

Mark only one oval.

Yes

No

15. COVID-19 Grants: please provide a schedule showing full details if not in accounting records or note that nothing was claimed. *

Mark only one oval.

Yes

No

Pension Income Received

16. Did you receive any UK State retirement/ widows pension? *

If Yes, then please send us the weekly rate from 6 April 2022 and the new rate from 6 April 2023.

Mark only one oval.

Yes

No

17. Did you receive any private pensions? *

If Yes, then please send us the P60 forms.

Mark only one oval.

Yes

No

18. Did you receive any pension income lump sums/drawdowns? *

If you have taken any lump sums or drawdowns from any pension (this includes private or state), please full supply details.

Mark only one oval.

Yes

No

Other taxable social security benefits

19. Did you receive any social security benefits such as for Jobseekers Allowance, *
Incapacity Benefit, Statutory redundancy payments etc

If Yes, then please send details.

Mark only one oval.

Yes

No

Income from property

20. Did you receive an letting income from property situated in the UK and/or abroad? *

If Yes then please send (1) Rents received for all months arising in the year (2) Expenses incurred e.g. maintenance, repairs, renewals, agents fees, service charges, ground rent. (3) Mortgages - Please provide name of lender(s) and certificate of interest paid from mortgage lender for tax year 2020/21. (4) For furnished holiday lettings provide details of dates of rentals.

Mark only one oval.

Yes

No

Income from Savings and Investments (excluding ISA's)

(If applicable, full schedules from your stockbroker are fine - please ensure both capital and income pages are included)

21. Did you have any of the following savings and investment income? Only tick the applicable boxes. *

Tick all that apply.

- No such income
- Interest from banks, building societies, and other institutions
- Dividends from shares (cash, stock and unit trusts)
- Chargeable event certificates from bond withdrawals/surrender
- Interest on any compensation payments received (e.g. PPI claims)

Income from overseas

UK residents are taxable on their WORLDWIDE income

22. Did you have any of the following sources of overseas income? Please tick the appropriate box *

Tick all that apply.

- No overseas income
 Rental income
 Pensions
 Employment
 Investment income
 Other

Other income received.

23. Did you receive any income from Trusts and Estates (R185 certificates required) *

Mark only one oval.

- Yes
 No

Other Information

24. Pension contributions made: Did you make any contributions personal (stakeholder, employee or self employed) pension schemes or retirement annuity policies. This also includes contributions to any overseas pension schemes. *

If yes, please send details.

Mark only one oval.

- Yes
 No

25. Loans/mortgages used for business purposes *

Tick all that apply.

- Not applicable
 Yes - Certificate of interest paid from mortgage lender will be sent.

26. Enterprise Investment Scheme, Venture Capital Trust or similar investments made *

Tick all that apply.

- Not applicable
 Yes - Certificates of investment will be sent.

27. Did you make any charitable payments (under gift aid rules) - UK Registered Charities? *

Details of Charitable Payments showing name of Charity paid to. Please indicate if payments are regular or one-off and provide Gift Aid Certificates.

Mark only one oval.

- Yes - regular
 Yes - one - off
 No

28. Chargeable Capital Gains or Losses (worldwide) *

Give details of assets disposed of during the year - enclose contract notes/invoices/completion statements for both sale and purchase of asset (property, land, shares etc) - Include cryptocurrency transactions.

Mark only one oval.

- Yes
 No

29. Student loans Did you have a student loan existing at any point in 2022/2023? *

If so, can you please confirm which of the following it was:

Please provide all details including your most recent loan statement from the Student (or other) Loan Company, even if it was repaid in the year.

Tick all that apply.

- None
- Plan 1 : Loans taken out between Sept 1988 and Sept 2012.
- Plan 2 : Loans taken out post Sept 2012.
- Post Graduate Loans
- Plan 4 Loans (Scottish)

30. Personal circumstances i) Give details of changes in circumstances from previous year including marriage, civil partnership, separation, divorce or change. (ii) If Taxlab does not deal with your spouse or civil partner's tax affairs and your income is less than £50k, please can you confirm if their income is under £12,500 for 2022/2023. *

Mark only one oval.

- Yes - there was a change in circumstances (Details will be sent)
- No changes

High Income Child Benefit Charge

31. Were you, or your spouse/partner (legal or co-habiting), entitled to receive any child benefit between 6 April 2022 and 5 April 2023? *

If any child benefit received then please send us details of the amount received, number of children along with their ages.

Mark only one oval.

- Yes
- No

32. Did either of you make the election NOT to receive any child benefit? If yes, please confirm the date the election applied from. *

Mark only one oval.

Yes

No

33. Please TICK one of the following if you are in receipt of child benefit: *

Tick all that apply.

I had the highest income for the 2022/2023 tax year.

I had the lower income in 2022/2023 tax year.

I do not know whose income was highest, make enquiries for further information.

Tax Refunds

34. Once calculated, if you are due to receive a Self Assessment Tax Refund for the tax year ending 5 April 2023, HMRC will pay the funds direct into your bank account. Please provide your bank details below.

35. Account name *

36. Bank name *

37. Account number *

38. Sort code *

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