

Date: April 2017

Ref: GDS /



FULL NAME _____

National Insurance No _____ UTR No (10 Digits) _____

DATE OF BIRTH _____ DAYTIME TELEPHONE NO _____

Email Address _____

2017 TAX RETURN CHECKLIST

Please answer the questions at the top of each section by encircling either "Yes" or "No". If "Yes", complete the section by ticking "Enclosed", "Not Applicable" or "With GKC" and supplying any other details requested. Otherwise go on to the next question.

INCOME FOR THE YEAR ENDED 5 APRIL 2017

Not				
Enclosed	Applicable	With GKC		Yes / No
			Form/s P60 and/or P45	
			Form/s P11D (showing details of expense payments & benefits)	
			Did you receive any pensions?	Yes / No
			Form/s P60 or other certificate/s of pension received	
			Weekly rate of pension/s @ 5 April 2017	
			Date/s pension/s commenced (if after 5 April 2017)	
			Did you receive any income through letting a property?	Yes / No
			Address/es of let property/ies and details of rent & expenses relating to each	
			Statement from lender/s of interest paid on each property during 2016/2017	
			Were properties furnished?	Yes / No
			Did you receive any other investment income?	Yes / No
			Bank & building society interest - account no/s & net amount (ie after tax) credited to each	
			Other interest & dividends (enclose tax vouchers)	
			Did you receive any other type of income not listed above?	Yes / No
			Jobseeker's allowance: name & address of Benefit Office and amount received	
			Other income: Child benefit? other income, amount/s received, details of tax deducted	

OUTGOINGS FOR THE YEAR ENDED 5 APRIL 2017

Not				
Enclosed	Applicable	With GKC		Yes / No
			Did you make any PERSONAL pension payments? (Do NOT include ones made by your company on your behalf)	Yes / No
			Statement/s from pension company/ies of all payments made during 2016/2017	
			Actual amount AFTER tax relief you expect to pay in the year to 5 April 2017	
			Did you make any Business Start-Up investments?	Yes / No
			Details of Venture Capital Trust investments & supporting certificates	
			Details of Enterprise Investment Scheme investments & supporting certificates	
			Did you make any maintenance or alimony payments?	Yes / No
			If yes, were you at least 65 years old on 5 April 2017?	Yes / No
			If yes, enclose copies of the relevant Court Orders	
			Did you make any of the following tax allowable payments?	Yes / No
			Subscriptions to professional & trade associations: full details (exclude voluntary payments)	
			Payments under deed of covenant: copy of deed/s & full details of actual amounts paid	
			Any other outgoings: full details of payments	

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CAPITAL TRANSACTIONS FOR THE YEAR ENDED 5 APRIL 2017

Not		
Enclosed	Applicable	With GKC

Did you sell any:

Shares and/or securities? **Yes / No**

Copies of purchase & sale notes

Business assets and/or property? **Yes / No**

Full description of asset/s, dates of acquisition & disposal, original cost, net sale proceeds

Other assets, including life assurance policies & investment bonds? **Yes / No**

Copies of chargeable event certificates

Were you granted, or did you exercise, any share options? **Yes / No**

Copies of supporting documents

ALLOWANCES FOR THE YEAR ENDED 5 APRIL 2017

Not		
Enclosed	Applicable	With GKC

Were you married at 5 April 2017? **Yes / No**

Full name & date of birth of husband or wife (if you have children, see below)

Date of marriage

Were you co-habiting at 5 April 2017? **Yes / No**

Full name of partner (if you have children, see below)

Did you separate or divorce during the year to 5 April 2017? **Yes / No**

Date of separation or divorce

Do you have any change of circumstances that might be relevant? **Yes / No**

Change in income sources? **Yes / No**

Change in income level? **Yes / No**

Change in Personal circumstances? **Yes / No**

Change in parents health (their Inheritance Planning) **Yes / No**

Anything else?

Do you have any Student Loans? **Yes / No**

If yes, please request and send us an up-to-date statement

Are you paying personal pension contributions? **Yes / No**

If yes, ensure you have entered your date of birth at the top of page 1

MISCELLANEOUS

Not		
Enclosed	Applicable	With GKC

Have there been any changes in your personal circumstances since 5 April 2017? **Yes / No**

Moved home? **Yes / No**

Changed jobs or moved to a different company? **Yes / No**

Married or separated? **Yes / No**

Any other changes in circumstances? (Please supply details) **Yes / No**

BOTH PARTS OF THIS CHECKLIST MUST BE RETURNED WITH THE 2017 TAX RETURN AND ALL RELEVANT DOCUMENTATION IN ONE PACKAGE. IF DOCUMENTS ARE DIFFICULT TO REPLACE, PLEASE COPY THEM AND SEND THEM BY SECURE POST.

If you send original documents, please arrange for their collection 30 days or more after delivery.

Tip: Remember our deadlines exist to reduce stress, improve planning & keep your costs down.

Notes: Please include notes on any other items that may have a bearing on your tax position in 2016/2017.

If in doubt, please tell us about it.

Apply or adjust Tax Credit applications with your tax office immediately to avoid loss or complications.

12/05/2017