

Your 2022 Tax Return

We need the following documents and/or information for the year
6 April 2021 to 5 April 2022 as soon as possible
to complete your Tax Return promptly and accurately.

Income from Employment

- Forms P60 and P11D. Your employer must supply these by 6 July 2022.
- Expenses incurred but not reimbursed by employer e.g. Subscriptions, WFH allowances.
- P45 details from any employment which ceased during 2021/2022, a P11D from that former employer and details of any termination payment.
- Details of AVCs where tax relief has not been given by your employer.
- Details of employer contributions to personal pension plans.
- Details of share options granted or exercised and Employee Share Purchase Plan purchases and sales.

Income from Pensions / DWP

- Form P60 in respect of any occupational pension.
- Details of any tax-free pension commutation payments received.
- The weekly/4 weekly rates of State pension or other taxable benefits paid by the DWP with effect from 6 April 2021 and from 6 April 2022.

Investment Income

- Section 975 certificates or copies of bank statements showing interest credits, or details of gross interest credits on bank/building society accounts.
- The dates of opening and closure for all accounts opened or closed during 2021/2022.
- Details of interest credited to National Savings Investments/Bonds. Please state the type of the investment, the interest credited and the date of credit.
- Interest/Dividend vouchers in respect of all cash and stock dividends received in respect of stocks, shares and unit trusts. ISA details are not required.
- Chargeable Event Certificates in respect of bond withdrawals exceeding the 5% allowance and/or policy surrenders.

Other income/deemed income

- Details of royalty income, consultancy fees and other earned income.
- R185 certificates in respect of income from Trusts or Estates and details of any capital payments received.
- Details of assets (including cash) gifted by you from which you still enjoy a benefit.

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Rental Income Business

- Details of rents due.
- Receipts in respect of rental expenses or details of the same.
- Loan interest certificates for loans used to purchase rental property or finance rental income business.
- If your property is managed by a letting agent, copies of statements issued by the agent.
- For furnished holiday lets, the total days the property was available for letting and the actual number of days let.

Acquisitions and Disposals

- Contract notes in respect of all share/stock/unit trust acquisitions or disposals in the period from 6 April 2021 to 5 May 2022.
- Details of land and property disposals, including date / cost at acquisition, sales proceeds, incidental costs of sale, date of disposal.
- Details of other chargeable disposals. If you are not sure whether a disposal creates a taxable gain or allowable loss, please send details for consideration.

Outgoings qualifying for Tax Relief

- Certificates of loan interest paid on loans, which qualify for tax relief.
- Evidence of payments (or gifts of shares or property) to Charity under Gift Aid.
- Details of all pension contributions made in the year,
- Venture Capital Trust/Enterprise Investment Scheme/Seed Enterprise Investment Scheme certificates.
- Details of maintenance payments made if you or the recipient were born before 6 April 1935.

Child Benefit Charge

If you, or your partner, receive child benefit and either of you earn more than £50,000, we would ask you to let us know;

- Your partner's income, if over £50,000.
- The name and date of birth of the children for whom child benefit is received.

These are the items most frequently reported on Tax Returns. If, however, you have received any other income or made any gains which might be liable to UK tax, please let us have full details so we can determine the Tax Return entry required.

Please also let us have:

Your contact telephone, email, address and marital status, if these have changed.

The Self-Assessment Tax Return or the 'Notice to Complete a Tax Return' if received.