

# Tax Return Helper 2008

Supplied by Marshall Roche

Please use this Tax Return Helper as a checklist of the information we need to prepare your tax return and as a reminder of the dates below. If you have already supplied the information to us, thank you - please use this checklist to ensure that nothing has been missed. All information supplied to us will be treated in the strictest confidence.

**Please note** - we cannot deal with all tax returns if they all come in at the last minute - **leaving it to the last minute risks a penalty.**

<b><u>Late return -</u></b>	Submitted after 31 January 2009	<b><u>Penalty</u></b> <b>£100</b>
	Submitted after 31 July 2009	<b>£200</b>
<b><u>Late tax payment -</u></b>	Paid after 28 February 2009	<b>5% of the tax</b>
	Paid after 31 August 2009	<b>10% of the tax</b>

If you had a new source of income during 2007/08, not taxed at source, the Inland Revenue **must be told** by 5 October 2008.

If you are employed and may have underpaid tax during the year, you can have **tax payments of up to £2,000 collected by adjusting your tax code**, so long as the tax return is with the Inland Revenue by 30 September 2008.

Aim to let us have all the necessary details before you go on holiday, so you can relax in the knowledge that it's all being taken care of. **If in any doubt about what we need, please contact us.**

**Please write your name here and return this list with the relevant information:**

<b>Your circumstances</b>	<b>Information supplied in respect of the year ended 5 April 2008</b>
<b>Personal information required (If this is not the first return we have completed for you, please just indicate any changes)</b>	Your full address Your date of birth and National Insurance number. If you are registered blind, the date you registered and the name of the authority If you are a married man living with your wife and either of you were born before 6 April 1935, please give your wife's full name
<b>If you worked for an employer</b>	P60 (certificate of earnings and tax paid) P45 or last payslip from any jobs left during the year. Copies of any coding notices received for 2007/08 or 2008/09. P11D or P9D (statement of taxable benefits) Details of tips or other amounts received but not covered by your P60 Details of any share options exercised during the year Details of any expenses you wish to claim, such as subscriptions or other expenses not reimbursed by your employer Dates of absence from the UK if working overseas for more than one tax year
<b>If you did any self-employed work</b>	If you have not yet let us have your accounting records, income / expenses details for the latest year, please forward this information. Normally this would be in the same format as the previous year. Please include details of any change in your car/van, including trade-in and cost of replacement. Also include details of any new loans or HP and any stock and amounts owing at the end of the financial year.
<b>If you received any Jobseekers Allowance or similar benefit</b>	The address of the benefit office who dealt with your claim The nature of the benefit (Note - child benefit can be ignored) The taxable amount as notified to you by the benefit office.

*Continued overleaf.....*



<b>If you receive a pension (inc state pensions)</b>	The amount received during the year Certificate of any tax deducted
<b>If you paid into a pension scheme</b>	If deducted from your salary before tax is calculated, no further details are required. If it is new scheme, or you increased your contributions, please supply full details. How much did you pay during the year?
<b>If you have building society / bank interest or other investment income</b>	Certificates of interest on any building society or bank accounts Details of any interest received gross, such as National Savings Income Bonds Tax vouchers for any dividends received from shares or unit trusts Details of any other investment income
<b>If you received any rental income</b>	The property address Is it let furnished or unfurnished? Tick here if net income from lodgers in your own home was less than £4,250 If over £4,250, a summary of income and expenses is required. (If you would like us to prepare this on your behalf, please supply all relevant records, including any interest certificate).
<b>If you disposed of anything valuable, worth more than when you acquired it (ie. capital gains) Eg. share dealings, property dealings etc.</b>	Details of what you disposed of The selling price or its value if you gave it away or sold it below value Any costs of disposal The dates you bought and disposed of it The price you paid for it, including any costs The costs and dates of any improvements Note: If you are certain that your total capital gains made during the year did not exceed £9,200, you may not have to report them. If in doubt, let us have details.
<b>Miscellaneous</b>	The amount of any tax refunds already received for the year in question. Details of any deeds of covenant or gift aid contributions (if a higher rate tax-payer). Details of any loans used to finance a business or purchase of small company shares, if not already included in your business accounts. Details of any other income, gains or potential claims for the year in question, not covered by the above Details of any Inland Revenue elections made with regard to your affairs Any other information which you feel may relate to your tax affairs for 2007/08.

**Please remember that we cannot be held responsible for any omissions from your tax returns if we have not been provided with the information. Too much is better than too little - we can always ignore what we do not need.**

All information used in the preparation of your tax returns must be collected from us and retained for six years from the end of the tax year to which it relates.

## **MARSHALL ROCHE**

### ***Business & Finance Specialists***

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The information contained in this help sheet is of a general nature.

No responsibility can be accepted for any action or inaction where specific advice has not been sought from ourselves.