

Tax Return Helper 2004

Supplied by Marshall Roche

This Tax Return Helper will help you to gather the information needed and avoid a penalty for omitting essential detail from your return. To help us to prepare your tax return on your behalf, please forward the completed check-list to us, together with the information and paperwork referred to in the relevant sections. All information 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 the last minute risks a penalty.**

		<u>Penalty</u>
<u>Late return -</u>	Submitted after 31 January 2005	£100
	Submitted after 31 July 2005	£200
<u>Late tax payment -</u>	Paid after 28 February 2005	5% of the tax
	Paid after 31 August 2005	10% of the tax

If you had a new source of income during 2003/04, not taxed at source, the Inland Revenue must be told by 5 October 2004.

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 2004.

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 full name here:	
Your circumstances	<input checked="" type="checkbox"/> Information supplied in respect of the year ended 5 April 2004
Personal information required (If this is not the first return we have completed for you, please just indicate any changes)	<input type="checkbox"/> Your full address <input type="checkbox"/> Your date of birth and National Insurance number. <input type="checkbox"/> If you are registered blind, the date you registered and the name of the authority <input type="checkbox"/> 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 <input type="checkbox"/> Please provide dates of birth of any children living with you.
If you worked for an employer	<input type="checkbox"/> P60 (certificate of earnings and tax paid) <input type="checkbox"/> P45 or last payslip from any jobs left during the year. <input type="checkbox"/> Copies of any coding notices received for 2003/04 or 2004/05. <input type="checkbox"/> P11D or P9D (statement of taxable benefits) <input type="checkbox"/> Details of tips or other amounts received but not covered by your P60 <input type="checkbox"/> Details of any share options exercised during the year <input type="checkbox"/> Details of any expenses you wish to claim, such as subscriptions or other expenses not reimbursed by your employer <input type="checkbox"/> Dates of absence from the UK if working overseas for more than one tax year
If you did any self-employed work	<input type="checkbox"/> 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, but also let us have details of any change in your car etc. and details of any new loans or HP. Remember to let us have any vouchers for tax deducted.
If you received any unemployment or similar benefit	<input type="checkbox"/> The address of the benefit office who dealt with your claim <input type="checkbox"/> The nature of the benefit (Note - child benefit can be ignored) <input type="checkbox"/> The taxable amount as notified to you by the benefit office.

Continued overleaf.....



If you receive a pension	<input type="checkbox"/> The amount received during the year <input type="checkbox"/> Certificate of any tax deducted
If you paid into a pension scheme	<input type="checkbox"/> If deducted from your salary before tax is calculated, no further details are required. <input type="checkbox"/> If it is new scheme, or you increased your contributions, please supply full details. <input type="checkbox"/> How much did you pay during the year?
If you received any investment income	<input type="checkbox"/> Certificates of interest on any building society or bank accounts <input type="checkbox"/> Details of any interest received gross, such as National Savings Income Bonds <input type="checkbox"/> Tax vouchers for any dividends received from shares or unit trusts <input type="checkbox"/> Details of any other investment income
If you received any rental income	<input type="checkbox"/> The property address <input type="checkbox"/> Is it let furnished or unfurnished? <input type="checkbox"/> Tick here if net income from lodgers in your own home was less than £4,250 <input type="checkbox"/> 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).
If you disposed of anything valuable, worth more than when you acquired it (ie. capital gains) Eg. share dealings, property dealings etc.	<input type="checkbox"/> Details of what you disposed of <input type="checkbox"/> The selling price or its value if you gave it away or sold it below value <input type="checkbox"/> Any costs of disposal <input type="checkbox"/> The dates you bought and disposed of it <input type="checkbox"/> The price you paid for it, including any costs <input type="checkbox"/> The costs and dates of any improvements <p>Note: If you are certain that your total capital gains made during the year did not exceed £7,900, you may not have to report them. If in doubt, let us have details.</p>
Miscellaneous	<input type="checkbox"/> The amount of any tax refunds already received for the year in question. <input type="checkbox"/> Details of any deeds of covenant or gift aid contributions (if a higher rate tax-payer). <input type="checkbox"/> Details of any loans used to finance a business or purchase of small company shares, if not already included in your business accounts. <input type="checkbox"/> Details of any other income, gains or potential claims for the year in question, not covered by the above <input type="checkbox"/> Details of any Inland Revenue elections made with regard to your affairs <input type="checkbox"/> Any other information which you feel may relate to your tax affairs for 2003/04.

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 retained (whether by you or by us) for six years from the end of the tax year to which it relates.

MARSHALL ROCHE

Business & Finance Specialists

Gosport Office

1 Portland Buildings, Stoke Road, Gosport
☎ 023-9234-0770
Gosport@MarshallRoche.co.uk

Waterlooville Office

77 London Road, Cowplain, Waterlooville
☎ 023-9234-0775
Cowplain@MarshallRoche.co.uk

Fareham Office

1-b Fareham Park Road, Fareham
☎ 01320-505035
Fareham@MarshallRoche.co.uk

Head Office: 61 Warsash Road, Warsash, Hants ☎ 01489-480722

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.

