

**2009/2010 TAX RETURN
CHECKLIST
(6 APRIL 2009 TO 5 APRIL 2010)**

Name

Address

.....

.....

.....

Contact Tel No:

Email Address:

Marital Status: Married/Divorced/Widowed/Single/Separated/Living Together as/Partner in a Husband & Wife Civil Partnership							
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Details of change to marital status during the last tax year and date of change:

Full name of Spouse/Partner:

Date of Birth Self : / / Date of Birth: Spouse/Partner / /
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NI number Self:	NI number Spouse/Partner:
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BERNARD ROGERS & CO
Chartered Accountants
Bank Gallery, High Street, Kenilworth, Warwickshire, CV8 1LY

Q1.	<p>Please Select which option applies to you.....</p> <p>Director of a Limited Company <input type="checkbox"/> Soletrader/Partnership <input type="checkbox"/></p> <p><i>Or please specify and explain if different i.e change in status during the year</i></p> <p>.....</p>
Q2.	<p>Were you employed during the year?</p> <p>Please Select.....</p> <p>By your Limited Company <input type="checkbox"/> By an external company <input type="checkbox"/></p> <p><i>If so please provide a Form P60</i></p>
Q3.	<p>Do you receive benefits from your employment? eg private healthcare/medical insurance/company car etc</p> <p><input type="checkbox"/></p> <p><i>If so please provide a Form P11D or P9D</i></p>
Q4.	<p>Do you receive any of the following income:</p> <p><i>If so please tick the box and provide the relevant certificate or details</i></p> <p>Rental income & expenditure (including the Rent-a-room scheme) <input type="checkbox"/></p> <p>Bank or Building Society Interest (Do not include ISAs) <input type="checkbox"/></p> <p>Dividend income from shares other than your Limited Company eg M&S <input type="checkbox"/></p> <p>Income from Trusts <input type="checkbox"/></p> <p>Settlements or estates of deceased persons <input type="checkbox"/></p> <p>Share Option Income or share related benefits <input type="checkbox"/></p> <p>Overseas Income <input type="checkbox"/></p>
Q5.	<p>Did you receive income from a pension during the year?</p> <p><input type="checkbox"/></p> <p><i>If so please provide a Form P60 for each pension received or details of the state pension</i></p>
Q6.	<p>Did you receive Dividend income from your Limited company?</p> <p><input type="checkbox"/></p> <p><i>If so please provide a breakdown of all dividends drawn from 6th April 09 - 5th April 10</i></p>

Please tick the box and provide the requested documentation if any of the following questions are applicable to you:

Q7.	<p>Do you pay into a pension scheme other than through your payroll? <input type="checkbox"/></p> <p><i>If so please provide a statement of payments made during the year</i></p>	<input type="checkbox"/>
Q8.	<p>Do you pay any of the following:</p> <p><i>If so please provide details of the agreement and amount paid during the tax year</i></p> <p>Gift Aid <input type="checkbox"/></p> <p>Interest on Qualifying Loans <input type="checkbox"/></p> <p>Subscriptions to Venture Capital Trusts or EIS <input type="checkbox"/></p> <p>Payments to Trade Union or friendly society for death benefits <input type="checkbox"/></p> <p>Professional Subscription <input type="checkbox"/></p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Q9.	<p>Are you registered as a blind person?</p>	<input type="checkbox"/>
Q10.	<p>Have you received any tax refunds during the tax year?</p> <p><i>If so please provide details</i></p>	<input type="checkbox"/>
Q11.	<p>Have you paid any tax during the year (other than deducted at source eg PAYE/building society?)</p> <p><i>If so please provide details:</i> 31st January 2010 31st July 2010</p>	<input type="checkbox"/>
Q12.	<p>Did you sell any assets during the year including your home?</p> <p><i>If the answer is Yes.....</i> <i>Please tick the box & provide details of the sale and any costs</i></p>	<input type="checkbox"/>

Please provide any other information you wish to communicate here:

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Do you want any tax repayment paid into your bank account?	Name of Bank: Name of Account Holder: Sort Code: Account No:
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I confirm that I have provided details of all income and tax deductible expenditure for the tax year 2009/2010.

Signed

Name Date

DO NOT RETURN THIS FORM UNTIL YOU HAVE ANSWERED ALL THE QUESTIONS AND ATTACHED ALL DOCUMENTATION. INCOMPLETE OR INCORRECT FORMS WILL BE RETURNED TO YOU UNPROCESSED.