

FOR POWER ACCOUNTAX CLIENTS ONLY

FORM 1: PERSONAL INFORMATION

FORM 2: SELF-ASSESSMENT INFORMATION REQUIREMENTS

FORM 1: Personal Information

If we do not already hold your personal client information then we require the following information:

1. Title
2. Forenames
3. Surname

4. Full Address including Postcode

5. Tel No Home
6. Tel No Work
7. Mobile Tel No
8. Fax No
9. Email

10. Date of Birth
11. Job or Work Title

12. Date of Marriage (if applicable)
13. Husband's or wives full name
14. Children under 18 years of age full name and date of birth:

15. Tax Reference Number:
*The 10-digit number appearing on top of your tax return form
Or Employer reference beginning with 3-digits then a slash "/", also be found on P60/P45, Payslip or Tax notifications
(If you sent us or are planning to send us your tax return form, please ignore this requirement)*

16. National Insurance Number
If you sent us or are planning to send us your P60/P45, Payslip or Notice of Coding please ignore this requirement)

17. Nationality

- If applicable:**
18. Business Name
19. Business Trading Address and Postcode
20. Nature of Business
21. Date Commenced Trading:

FORM 2: Self-Assessment Information Requirements

We require the following information specifically for self-assessment:

1. Employment *(if we run your payroll for you, you can omit this section)*

- P60 or P45, if you have neither than your payslip for 31 March
- P11D showing car benefit and other benefits
- P2 – Notice of Coding, showing the breakdown of your tax code (do not worry if you cannot find it)

2. Self-Employment (Partnership or Sole Trader)

- Bank Statements from 1 April to 31 March or cashbook
- Cheque stubs if you haven't written on the bank statement what each cheque is for
- Sales invoices and money put into the business, if you haven't written on the bank statements what each credit is
- Business car mileage for the year (or for rental property, mileage done in year to visit property)
- Any body you owe money to at 31 March (Creditors), including loans and suppliers
- Any body who owes you money at 31 March (Debtors), including customers
- Last years accounts (if we have not already got them)
- Last years self-assessment form (if we have not already got them, or received it from your previous accountant)

Land & Property Income (Rental) – *as above, or simply give us your rental income and costs of renting*

- Address of rental property

3. Bank Interest

- Bank Name
- Bank Branch
- Account Number
- Whether it is a joint account
- Total interest received either after tax (net), before tax (gross), tax amount in the year 1 April to 31 March *(if you do not have all three any one will do)*

4. Dividend Income *(if we prepare your company accounts, we do not need details of your company dividend)*

- Name of Company
- Address of Company
- Number of Shares held
- Date of Dividend Paid
- Total dividend paid before tax (gross), after tax (net), amount of tax deducted *(if you do not have all three, any one will do)*

5. Private Personal Pension Scheme

- Name of Pension Company
- Pension Company Address
- Pension payment per month, per year, or one-off contribution

6. Sold a property in the tax year?

Capital Gains Tax information

- Amount you sold the property for
- Date you sold the property
- Amount you bought the property for
- Date you bought the property
- Costs of purchasing the property: *Solicitors fees, Land Registry fees, Survey/Valuation Fees, Arrangement Fees*
- Cost of any improvements to the property, like extensions, new walls
- Date of improvements
- Cost of selling the property: *Estate Agents Fees, Solicitors Fees and so on.*

7. Inform us if you have any: **Foreign Income, Trust Income, any other income not mentioned above**