

2023/24 Personal Tax Organiser

Use this Personal Tax Organiser to keep all your tax documents together and as a checklist of what to provide us at the end of the tax year. The tax year runs from 6th April 2023 to 5th April 2024.

Some tips to help...

1. Open a folder, place this at the front and file all your tax documents behind in an organised manner.
2. If unsure whether to include anything, put it in with an explanation.
3. If you need more space for any areas, please use a separate piece of paper.

Personal Information

Full name:

Address:

Telephone:

National Insurance No:

Tax Reference No:

Date of birth:

Male or Female:

Spouse/civil partner full name:

Date of marriage/civil partnership:

Spouse/civil partner date of birth:

Are you resident in the UK: YES/NO:

Statement of Account

Please provide copies of any statements of account received from the HM Revenue and Customs (HMRC).

Bank / Building Society**Interest Income**

Please provide a certificate of interest received from each source in the year or bank statements or detailing the interest received (gross, tax and net), making clear if any accounts are joint accounts.

How many accounts do you earn interest from in total?

Dividend Income

Please provide all dividend vouchers for dividends received during the year.

How many different sources do you receive dividends from?

State Pensions and benefits

Enter the weekly amount of State pension received during the year £

If this started during the year, please provide the start date

Please provide details of any other State benefits received during the year and form P45U or P60U in respect of any Incapacity Benefit / Employment and Support Allowance (ESA) or Jobseekers Allowance (JSA) received...

Benefit**Amount received in the year****Pension Income**

Please enclose a P60 for each pension received during the year and list the names of the payer(s) here:

Employment

For each employment in the tax year, please provide details of the employer's name and your job titles together with any forms P45 you have or P60. Please also include tax code notices received from HMRC (form P2):

Date employment commenced or ceased if during the tax year

If you are a director is the company a close company: YES/NO

Please provide a copy of the P11D from each employment (which shows details of any benefits in kind received).

Please provide details of any lump sums received

Please provide details of any tax deductible expenses you incur personally with your employment that have not been reimbursed by your employer

Self-Employment/Partnership

Please indicate if you have had income from self-employment or a partnership and the nature of your trade.

If we do not prepare these accounts, please provide copies of accounts and tax computations.

Land & Property

Please provide details of rents received and expenses incurred in respect of let properties and identify whether they holiday lettings, furnished or unfurnished lettings.

Provide a certificate of any mortgage interest paid.

Capital Gains

If you made any capital gains during the year such as from sale of shares, property (not your main residence) please provide dates and amounts of cost, sale proceeds and incidental expenses.

Please supply contacts/completion statements.

Pension Contributions

If you made any pension contributions to a personal pension or free-standing AVC scheme (type), please provide details and identify those paid gross or net of tax.

For new pensions taken out in the year, please provide pension certificates.

Pension Company	Policy No	Amount Paid	Type	Paid net or gross
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Reliefs

If you are entitled to any of the following reliefs that are not included in your tax code calculation, please indicate:

- Blind Persons Allowance
- Marriage Allowance
- Other

Other Outgoings

Please provide details of any other relevant outgoings. For example:

Interest on qualifying loans – please provide interest certificate
Venture Capital Trust subscriptions

Gift Aid payments

Any Other information

If there is any other information at all that you think may be relevant to the completion of your tax return, please provide details. This could include any other income of any kind such as gains on life assurance policies, share schemes, foreign income, trust income or any other income of any kind.

If in doubt, please provide details.