

## Working in Practice

### Self Assessment – Client's Details

The following details are required when a client presents an Agent with a self assessment form for completion. The following can be used to check that all the relevant details have been collected before the self assessment is completed. Valuable time can be lost chasing for details and paperwork.

Information	Information Received
<b>Bank, Building Societies</b> and any other interest bearing accounts for the period from 6 <sup>th</sup> April to 5 <sup>th</sup> April the following year – Original documents preferred	
<b>Dividends</b> from UK companies including Scrip – Original documents preferred	
<b>Pensions received</b> including State Pension	
<b>Gains on Life insurance policies</b>	
<b>Pension contributions</b> made including annuities and PPPs	
<b>Claims for reliefs</b> (For example Child Support Agency, Venture Capital and Enterprise Investments)	
<b>Gifts to Charity</b>	
<b>Blind Person's and Married Person's Allowances</b>	
<b>Student Loans</b> payments	
<b>Tax Coding Details</b> from employment	
<b>Personal Details</b> Full name Marital Status Date of Birth National Insurance Number	

In all cases it is better to have the original documents, and take copies for the file before returning.

All the supplements will require documentation before they can be completed fully.

Supplements	Information Received
<b>Employment</b> P45 P60 P11D Redundancy payments Any business expenses paid but not refunded by the employer	
<b>Share Schemes</b>	
<b>Self Employment</b> income	
<b>Partnership</b> income	
<b>Land and Property income</b> Rent a room over £4250 (2004/5) Holiday lets Other Property Income	
<b>Foreign income</b> Investment interest Overseas Pensions Land and Property abroad Benefits received from foreign trusts, companies or other entities	
<b>Trust income</b>	
<b>Capital Gains</b> On Disposal of chargeable assets worth more than £34,000 (2005/06) i.e. shares, or chargeable gains of more than £8,500	
<b>Non Residence</b> – where the tax payer lives and works abroad	