

## 2020/21 SELF-ASSESSMENT TAX RETURN

### REQUIRED INFORMATION

Please find below our standard table for providing information to complete your self-assessment tax return for the 2020/21 tax year which covers the period 6 April 2020 to 5 April 2021.

Where your income or other details are not covered by the listed questions please add a few notes at the bottom of the last page.

The right side of the table headed enclosed enables you to tick when you have provided supplementary detail and add your comments where helpful.

#### **Section A - About your income**

QUESTION	ACTION	DETAIL REQUIRED	ENCLOSED
1. Are you employed?	no, go to q2		
	yes	Please provide form P60 or P45 for all employments in the year ended 5 April 2021. Provide any form P11d relating to benefits in kind received from employer in the year.	
2. Are you self-employed?	– no, go to q3		
	yes	Provide all invoices, expenses, and bank statements for the period of your accounts. Also summarise the accounting package data.	
3. Are you in a partnership?	-no, go to q4		
	yes	Provide the partnership statement showing your share of profits for the year end which falls into the 2020/21 tax year.	
4. Do you receive a pension?	no, go to q5		
	yes	Please provide form P60 for each pension as well as details of your state pension, if received.	
5. Do you have bank and or building society accounts that produce interest?	no, go to q6		
	yes	Provide tax certificates for 2020/21 for all interest received. Accounts will be treated as jointly held where the correspondence is addressed to you and your partner. If you have an investment portfolio, please provide the consolidated tax certificate for 2020/21.	
6. Do you hold shares in your name, either directly or within a	no go to q7		

portfolio managed by a financial advisor?			
	yes	Provide tax certificates for all dividend payments made (including stock dividends which are re-invested). If you have an investment portfolio, please provide the consolidated tax certificate for 2020/21.	
7. Do you have income from rental properties?	no go to q8		
	yes	Provide rental income and expenses, including an agent's statement where received. Advise if the property is jointly held and whether it is rented as a short stay holiday property.	
8. Do you have foreign income?	No, go to q9		
	yes	Provide details of any income received from outside the UK be it interest, dividends, pension, rental, employment, or self-employment. Include the country where received and any tax suffered by the overseas territory.	
9. Do you receive income from a Trust?	No, go to q10		
	yes	Provide your form R185 showing income received and the attaching tax credit	

## **Section B - About your Gains**

QUESTION	ACTION	DETAIL REQUIRED	ENCLOSED
10. Did you dispose of assets in 2020/21	no, go to q13		
	yes, see question 11		
11. Were the total <b>gains</b> (proceeds less cost) more than £12,300?	no, go to q12		
	yes	Please provide details of the assets disposed of the proceeds received and the cost of acquisition together with dates.	
12. Were the total <b>proceeds</b> in the year more than £49,200?	no go to q13		
	yes	Please provide details of the assets disposed of the proceeds received and the cost of acquisition together with dates.	

## Section C – Claims, allowances, and charges

QUESTION	ACTION	DETAIL REQUIRED	ENCLOSED
13. Did you make pension contributions?	no, go to q14		
	yes	Provide details of pension contributions paid to personal pension scheme or AVC, we need pension provider, policy number and amount paid (do not include pension contributions paid through employment where the contribution is taken from gross income).	
14. Did you gift aid any charitable donations?	no, go to q15		
	yes	Provide amount paid and charity.	
15. Do you have a student loan	no, go to q16		
	yes	Is it Plan 1 /Plan 2 or Postgraduate loan?	
16. Do you or your partner receive child benefit	no, go to q17		
	yes	Provide details of no of children and if your partner's income is more than yours. If this stopped in the year the date it stopped.	
17. Have you made an online claim for Marriage Allowance to transfer your allowance to your partner or them to you?	no, go to q18		
	yes	Provide date of claim and who transferred the allowance.	
18. Have you received any tax refund in the year?	no, go to q19		
	yes	Please provide details as to the date and amount.	

**Section D - Other information**

QUESTION	ACTION	
19. If available would you prefer to have your tax liability included in your employment tax code?	no/ yes – please state in column on the right.	
20. Do you want to continue to receive details of tax investigation insurance each year?	no/ yes – please state in column on the right.	
21. Do you want to receive a tax data card each year?	no/ yes – please state in column on the right.	Please note the details are on our website

**Section E – Additional Information**

Completed by (signature).....

FULL NAME IN CAPITALS:

DATE: