

## Income

### **Employment/Directorship Details**

- PAYE: Pay and Tax (Form P60/P45) - Benefits in Kind (Form P11D) – Salary sacrifice benefits
- Any expenses which are incurred exclusively as a result of your employment
- Student Loan Repayments - If you are liable to make student loan repayments, please advise if Plan1 or Plan 2 along with the amount deducted through PAYE or paid via Self-Assessment and if it is likely to be repaid within the next 2 years

### **Self-Employment and/or Partnership Income**

### **Pensions, Annuities or State Benefits**

- State Pension, Occupational Pension, Retirement Annuities, taxable lump sum pension payments
- State Benefits – e.g. JSA, Universal Credit, Taxable Incapacity Benefit/ESA, Carer's Allowance

### **Interest Received on UK Savings & Investments**

- Bank/Building Society interest
- Untaxed interest
- Any other taxed interest
- Peer to peer lending
- Dividends from shares
- Distributions from REITs

### **Any Other Income e.g.**

- Capital gains from crypto currencies
- Foreign income
- Income from sale of shares
- Other capital gain from disposal of shares
- Interest received on PPI refunds
- Gains on surrender of life insurance policies
- Land and property rental income
- Any other income not covered by the above

## Reliefs and Allowances

### **Pension Contributions**

- Personal pension plans/ Retirement Annuity Contracts
- FSAVC's

### **Other Reliefs**

- Donations to charities e.g. through Gift Aid
- Vocational Training
- Interest on qualifying loan
- Subscription to Venture Capital Trust, EIS/SEIS
- Trade Union or Friendly Society payments
- Rent paid gross outside of the UK

**Pre-owned Assets Tax** - Please advise us if you have gifted any assets in the past for which you still enjoy the benefit

**Second Residence** - Please inform us if you have, or are planning to purchase a second residence

**Substantial Gifts** - Please inform us if you have gifted any substantial property during the year

**Residence** - Please tell us if you were one or more of the following:

- Not resident/not ordinarily resident or not domiciled in the UK and claiming the remittance basis/dual resident in the UK and another country
- Resident in Scotland