

# SELF ASSESSMENT TAX RETURN FOR YEAR ENDING

Name:		Trading Name (if different):	
Telephone Number:		Mobile Number:	
Email:			DOB:
Address:			
National Insurance Number:		UTR (Unique Taxpayers Reference Number):	
Business Name:		Description of Business:	
Business Address:			
Accounting Period End: 31 Mar <input type="checkbox"/> 5 Apr <input type="checkbox"/>		Business Start Date:	
Have the business details changed in the last 12 months? YES <input type="checkbox"/> NO <input type="checkbox"/>			

## DO YOU HAVE ANY OF THE FOLLOWING TO DECLARE B

INCOME	YES	NO	£
Income earned from other employment	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Income received from self-employment	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Income received from a partnership	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Rental income from UK property	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Foreign Income or Capital Gain	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Income received from trusts	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Capital gains in the United Kingdom	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Are you a non-resident?	<input type="checkbox"/>	<input type="checkbox"/>	
Untaxed UK interest received (total amount)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Taxed UK interest received (net amount after tax taken off)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Any dividends from UK companies	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Benefits received either from the state or an employer (including SEISS)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>

TAX RELIEFS	YES	NO	£
Gift aid payments made	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Pension contributions made to registered pension schemes	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>
Tax payments you have already made this year (payments on account)	<input type="checkbox"/>	<input type="checkbox"/>	£ <input type="text"/>

If you have selected 'Yes' to any of the above, please provide supporting documentation as detailed on the following page

## Supporting documentation relating to answers provided on the previous page:

Employment Income	P45: Attached <input type="checkbox"/> N/A <input type="checkbox"/>	P60: Attached <input type="checkbox"/> N/A <input type="checkbox"/>	P11D: Attached <input type="checkbox"/> N/A <input type="checkbox"/>
Self-employment Income Spreadsheet containing Income & Expenses:	Attached <input type="checkbox"/> Request a Spreadsheet template <input type="checkbox"/>	Online Software <input type="checkbox"/>	N/A <input type="checkbox"/>
Partnership Income Spreadsheet containing Income & Expenses	Attached <input type="checkbox"/> Request a Spreadsheet template <input type="checkbox"/>	Online Software <input type="checkbox"/>	N/A <input type="checkbox"/>
Property Income Spreadsheet containing Income & Expenses:	Attached <input type="checkbox"/> Request a Spreadsheet template <input type="checkbox"/>	Online Software <input type="checkbox"/>	N/A <input type="checkbox"/>

If you have complete records on an online software and would like to give us access, please use Louise Handley - louise@perfect-balance.uk when inviting us to use your software, and allow us to manage users

Other information to declare - please give information of anything else we should be aware of that may be relevant to the correct completion of your tax return

## AGENT ACCESS



To enable us to submit your tax return we will need to be given agent access. This can either be done by logging into your Government Gateway account online and adding us as an agent to manage your Self Assessment (see instructions below) or we can request access (this option will take longer and requires a code to be posted to you from HMRC that you will need to give to us).

Please advise which option you require:

I require you to add me as a client and will provide the Authorisation code as soon as it arrives	<input type="checkbox"/>
I will add you via my Government Gateway account	<input type="checkbox"/>
You already act as my agent	<input type="checkbox"/>

## INSTRUCTIONS TO ADD US AS YOUR AGENT FOR SELF ASSESSMENT

- Log into your Gateway account
- Manage account (you may need to click on Business Tax Account first)
- Manage tax agents / Add, view or change tax agents
- Select the service (Self Assessment)
- Click add an agent on the relevant scheme
- Enter our ID PB-SQRTA68NMD8S
- Add agent

If you need any help, please feel free to call us!

## DECLARATION

I declare that the information I've given is correct and complete to the best of my knowledge and belief. I understand that I may have to pay financial penalties and face prosecution if I give false information that is submitted on my tax return.

Sign here

Date