Here is your *2008/09* *INCOME TAX ORGANISER!*

This is your FREE Sanders Geeson Personal Tax Organiser for the tax year to 5 April 2009. Use it as your tax folder and follow the instructions below. This organiser will help you assemble your tax information and act as a checklist. Highlight any changes from last year.

We hope you will find it useful and informative.

1. Use a folder to keep all your tax return information together.
2. Throughout the next tax year put all tax information into a similar folder.
3. If you are not sure whether an item is relevant to your tax return put it in the folder with an explanatory note.
4. Orderly filing of these documents, within the folder, in both date order and category, e.g., dividend vouchers, interest certificates etc., will greatly assist in the preparation of your tax return.
5. Please prepare a schedule for each of the main categories in your tax folder, such as your dividend income or share acquisitions and disposals.
6. HMRC Statement of Accounts – please provide copies of any Statements of Account received from HMRC

Please contact us on 01924 254802 or email to admin@sandersgeeson.co.uk or post or deliver to Sanders Geeson (at Raines House, Denby Dale Road, Wakefield, WF1 1HR) as soon as you have completed your Tax Organiser for the tax year to 5 April 2009.

Yours sincerely,

Jan Szczepanski, Director

P.S. Please let us know if you would like further copies of our organiser for a friend or colleague. We are also always pleased to welcome referrals of new clients

TAXPAYER INFORMATION

Your Full Name:____

Address____

____

Home Telephone _____________________ Work Telephone ____________

Mobile ____________________________ Fax ____________________________

Your National Insurance Number __________________

Your Tax Reference Number (UTR) ____________________

Your Date of Birth ________________ Sex_________

Spouse's Full Name ____

Spouse's Date of Birth _______________________________

SPOUSE INFORMATION

Your Full Name:____

Address____

____

Home Telephone _____________________ Work Telephone ____________

Mobile ____________________________ Fax ____________________________

Your National Insurance Number __________________

Your Tax Reference Number _____________________

Your Date of Birth ________________ Sex_________

Spouse's Full Name ____

Spouse's Date of Birth _______________________________

OTHER

Marital Status _____________ Date Married ______________

Residence Status: I am Resident in UK: Y/N If not, I am Resident in ___________________

Domicile Status: I am Domiciled in UK: Y/N If not, I am Domiciled in __________________

If you have any children (up to 19) please provide full names and dates of birth Tick this Box ☐

If you are married and your wife is totally incapacitated Tick this Box ☐

If you are entitled to a Blind person's allowance Tick this Box ☐

If you are a widow(er) and your husband/wife died after 5.4.08 Tick this Box ☐

Student Loan: Do you have a student loan outstanding? Yes/No

Number of residences since 5.4.08 (if more than one, please provide details):

Note: Please advise us if your spouse or direct relative has a shareholding in a limited company

YOUR 2008/09 TAX RETURN ORGANISER

		Tick Enclosures
1. Employment	Please state your occupation and schedule your employments in the tax year to 5.4.09, with dates worked. Enclose your forms P45 & P60 2008/09	☐
	____	
	If you are a director, is the Company a "Close Company"? Yes\No	
	Provide details of any lump sums received from your employer and any professional subscriptions or other tax deductible expenses you pay personally.	
2. Benefits-in-kind	Enclose a copy of form P11D 2008/09. Your employer should provide you with a copy by 5 July 2009 latest.	☐
3. Self Employment	Specify the nature of your business _____________________ Enclose accounts for the two years ending between 6.4.07 and 5.4.09 if not already available to us.	
	Tick if this is your first, second, or last year/period of trade	☐
	Enclose a copy of your Capital Allowances claim if we don't have these already.	
4. State Pension Income	Enter the weekly rate received in the year Rate payable between 6.4.08 & 5.4.09 £____ If your pensions started after 6.4.08 enter start date here ______	☐
5. Other Pension Income	For each other pension that you receive please write the Payer's name & address below and enclose your form P60 2008/09. ____ ____ ____	☐
6. State Benefits	Please provide details of any state benefits (other than pension) received during the year to 5th April 2009 and form P45U and P60U in respect of any incapacity benefit or jobseekers benefit received.	☐

		Tick Enclosures
7. Interest Income	Obtain a certificate of interest received for each source for the period 6.4.08 to 5.4.09 and enclose these certificates. Please state how many certificates are enclosed ____.	☐
8. Dividend Income	Show the total of dividends received for the period 6.4.08 to 5.4.09 here £ ________. Enclose all dividend vouchers for the same period. Please state how many vouchers are enclosed ____.	☐
9. Capital Gains	If you sold any shares or made any Capital gains or losses during the period 6.4.08 to 5.4.09, such as sale of shares or property (not main residence) please enclose a schedule showing description of item and date purchased, price paid, date sold and net sale proceeds together with incidental expenses. Please supply copies of contracts/completion statements.	☐
10. Other Income	If you have any other sources of income not included in items 1 to 9 please enclose separate schedules for each source E.g. Life assurance "chargeable event" gains etc.	☐
11. Loans	Obtain a certificate of interest paid from your lender for any loans eligible for tax relief for the period 6.4.08 to 5.4.09 and enclose this certificate. Enter the name & address of your Lender below ____ ____ ____	☐

12. Pension / Retirement	If you made any payments during the period 6.4.08 to 5.4.09 please enclose a list-stating name of Pension Company, Policy No. & Amount paid during this period. Enclose form PPCC for all policies commenced after 6.4.08, Policy No. & Amount paid during this period. Ensure you clearly identify those paid net of tax relief and those paid gross. Provide details of any AVC's refunded to you in this year.	☐
13. Land and Property	Provide details of rents received and expenses incurred in respect of let properties and identify whether holiday lettings, furnished or unfurnished. Provide a certificate of any mortgage interest paid.	
13. Other Outgoings	If you have made any other payments or are entitled to any deductions not covered above or have made any gifts please enclose separate schedules for each item. E.g. EIS/VCT investments, gift aid payments etc.	☐
14. If non-UK Domicile	Please provide full details of your anticipated offshore non-UK income and gains for 2008-09 ____ ____	☐
	Have you been UK Tax Resident for 7 out of last 10 tax years?	☐
15. Other Tax Information	If there is any other information that you think maybe relevant to the completion of your tax return, please provide details below or on an enclosed schedule. This could include any other income of any kind such as a gain on life assurance policies, share schemes, foreign income or trust income. If in doubt, please contact us. ____ ____ ____	☐