



CerTax Accounting (Sandbach)
01270 762523
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Here is your *2009* ***INCOME TAX*** ***ORGANISER!***

This is your **FREE Personal Tax Organiser** for the tax year to 5 April 2009. Use it as your tax folder and follow the instructions on the inside of the front page. This organiser will help you assemble your tax information.

We hope you will find it useful and informative.

1. Use a folder to keep all your tax return information together.
2. Throughout the tax year put all tax information into the 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.

Please contact **Sharon** on **01270 762523** (email sharonjoyce@certax.co.uk) as soon as you have completed your Tax Organiser.

Yours sincerely,

Sharon Joyce BA (Hons) FCCA

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

TAXPAYER INFORMATION

Your Full Name: _____

Address: _____

Home Telephone _____ Work Telephone _____

Mobile _____ Fax _____

Email _____

Your National Insurance Number _____

Your Tax Reference Number (10 digits) _____

Date of Birth _____ Sex _____

SPOUSE INFORMATION

Your Full Name: _____

Address _____

Home Telephone _____ Work Telephone _____

Mobile _____ Fax _____

Email _____

Your National Insurance Number _____

Your Tax Reference Number (10 digits) _____

Date of Birth _____ Sex _____

FILING STATUS

Marital Status _____ Date Married (if after 5 April 2008) _____

Residence Status (Please tick one of the following Boxes)

I am Resident in UK I am Resident in _____

If you have any children (up to 19) please provide full names & 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

Please also attach copy of death certificate

YOUR 2009 TAX RETURN ORGANISER

Tick Enclosures

1. Employment Please state your occupation and your current employer's name. Enclose your form P60 2008/09
- _____
- Date employment commenced, if after 5.4.08 ______
- 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 you pay.
2. Benefits-in-kind Enclose a copy of form P11D 2008/09. Your employer should provide you with a copy.
3. Self Employment Specify the nature of your business _____
- Enclose accounts for the two years ending between 6.4.07 and 5.4.09
- Tick if this is your first, second, or last year/period of trade
- Enclose a copy of your Capital Allowances claim.
4. State Pension Income Enter the weekly rate shown in your Pension book or DSS.
- 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. Future Pensions If you expect to receive a new pension after 5.4.08 please provide the following information: Expected start date ______ Amount of Pension £_____.
- Is this weekly, 4 weekly, monthly, quarterly or annual?

YOUR 2009 TAX RETURN ORGANISER

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 please enclose a schedule showing description of item and date purchased, price paid, date sold and net sale proceeds.
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
- _____
- _____
- _____

YOUR 2009 TAX RETURN ORGANISER

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.
Please 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 properties let and identify whether furnished or unfurnished.
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. Other Tax Information _____

