

MAAP's Personal Self Assessment Tax Return Information Checklist

Start of Tax Fiscal Year	06 April 2024
End of Tax Fiscal Year	05 April 2025

Please complete this form so that we can prepare your personal tax return ahead of the 31st January 2026 filing deadline.

Please don't assume we know you have been asked to file a personal tax return for this current tax year. Please tell us one is expected.

We shall rely entirely upon the information you provide us to prepare your personal tax return.

So it is important you double check you have entered **ALL** the information we shall need to complete your return.

The list of information we ask for is not exhaustive. If you have any doubts over any of the points raised please call us on 01202 474545.

Please ensure you inform us of any overseas bank accounts, assets, and income you receive.

To avoid you having to pay late filing penalties, please assume your tax return has not been filed until you receive a copy of the HMRC's receipted tax return from us. This is your proof we have successfully filed the return with the HMRC on your behalf.

A. CONFIRMATION OF YOUR PERSONAL DETAILS

Your first name(s)			
Your last name			
Your UTR (10 digits)			
Your N.I. number			
Your date of birth			
Your current residential address			
Your postcode			
Spouse's name			Spouse's Date of Birth

Confirmation of your *Payments On Account* (POA) made to the HMRC relevant to the current tax year under review

Please state how much you paid the HMRC in respect of the first POA due in respect of 2024/25 due before 31 January 2025

Please state how much you paid the HMRC in respect of the second POA due in respect of 2024/25 due before 31 July 2025

If no payments were made, enter £0.00

A.1 HIGH INCOME CHILD BENEFIT CHARGE

[HMRC Link](#)

You may have to pay the High Income Child Benefit Charge if you or your partner have an individual income that's over the £60,000 threshold:

and either:

- you or your partner get Child Benefit; or
- someone else gets Child Benefit for a child living with you and they contribute at least an equal amount towards the child's upkeep.

If relevant, please confirm:

How much you or your partner received in the way of Child Benefits in the current tax year ended 5 April 2025

£

B. EMPLOYMENT HISTORY

Were you employed during the tax year under review?

Y / N

If yes, please confirm the number of P60's you are sending to MAAP to be included in your tax return

Alternatively, for each employment, please give the following details:

1 Employer's name	
Employer's Payroll Reference	
Gross pay received in tax year	
Income Tax deducted in tax year	

2 Employer's name	
Employer's Payroll Reference	
Gross pay received in tax year	
Income Tax deducted in tax year	

Did you receive any *Benefits in Kind* or expense payments from your employer(s)? Y / N

If 'YES' please attach a copy of the P11D statement your employer should have given you.

Did any major changes occur in the year (e.g. redundancy or retirement)? Y / N

If 'YES', please give brief details of the change and any additional payments made to you in compensation.

B.1 HIGHER-RATE TAX RELIEF ON YOUR PENSION PAYMENTS INCLUDED ON YOUR PAYSLIPS

Your payslips will disclose the amount of your personal pension contribution deducted from your net pay. This payment will be adjusted to give you basic rate tax relief at source. If you are a higher-rate tax payer, you can claim additional marginal tax relief in your tax return.

To claim higher-rate pension contributions relief:

Please add up the total of your employee pension contributions you have paid during the year and record the amount here.

£

Do not include your Employer's contributions. You can only claim the amounts you have paid.

C. OTHER EARNED INCOME

Were you engaged in any self employed (including partnership) activities during the tax year for profit or loss?	Y / N
Did you receive any expenses or remuneration from any sports or social clubs you may be involved in?	

If 'YES' please provide details unless this firm already prepares accounts for the activity involved.

D. INCOME FROM PROPERTIES

Did you receive any income from any properties you own here or abroad? Y / N

If 'YES' please provide details unless you have already forwarded the details of income and allowable expenditure to this firm.

E. INCOME FROM PENSIONS

Y / N

Did you receive any income from a pension fund during the year?

If 'YES' please provide the P60 you should have received from the pension provider.

Did you receive state pension during the year?

Y / N

If 'YES', please state the pension amount received during the year

£

Also please let us know if your spouse received state pension

There may be an opportunity to set-off unused personal allowances if you are of retirement age

F. OTHER STATE BENEFITS RECEIVED

Did you receive any state benefits such as carer's or job seekers allowances during the year?

Y / N

If 'YES' please provide details of the payments received

G. INVESTMENT INCOME RECEIVED

Did you receive any savings account interest during the year?

Y / N

If 'YES' please provide details of the investment interest received during the year, even if the payments only amount to a few pence

1 Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

2 Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

3 Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

4 Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

5 Bank or Building Society name

Account number

NET interest received

Income Tax deducted at source

Was the account in joint names? If so, how many?

H. INCOME FROM STOCKS AND SHARES

Did you receive any income of stock issues from the shares you held during the year?

Y / N

If 'YES' please provide details of the investment income you received during the year.

I. RELIEFS AND ALLOWABLE DEDUCTIONS AGAINST TAXABLE INCOME

Did you have any loans you believe may qualify for tax relief?

Y / N

If 'YES' please provide details of the loan and the interest paid during the year

Did you personally pay into any pension fund during the year?

Y / N

If 'YES' please provide details of the Pension fund and the gross or net payments made during the year

Did you make any Gift Aid payments or any covenants during the year?

Y / N

If 'YES' please provide details of the payments made during the year

J. CAPITAL GAINS

Did you buy, sell or give away any assets subject to Capital Gains Tax regulations?

Y / N

If 'YES' please provide details of the purchase or disposals made during the year

K. ANY OTHER INFORMATION YOU FEEL WE SHOULD KNOW?

Please inform of any changes in your personal circumstances that may affect your personal tax affairs.
