

2022/23 SELF ASSESSMENT TAX RETURN CHECKLIST

NAME _____

Forms P60/P45 (or final payslip) in respect of employment :

Employer	Enclosed

Forms P11D in respect of employment :

Employer	Enclosed

Please provide accounts (income and expenditure) information for your sole trade(s):

Name	Period of account	Enclosed

Forms P60 in respect of any pensions you receive:

Pension provider	Amount received	Enclosed

Joint Managing Directors:

Rajesh Jiwani ATT, CTA
 David White AFA, MIPA

Charterhouse (Accountants) Ltd,
 OneSixSix, 166 College Road,
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Charterhouse is a trading name of Charterhouse (Accountants) Limited. A limited company registered in England and Wales No: 9082390. Registered and Head Office: 166 College Road, Harrow, Middlesex HA1 1RA. Regulated for a range of investment business activities; and licensed by the Institute of Chartered Accountants in England and Wales to carry out the reserved legal activity of non-contentious probate in England and Wales. Charterhouse is also a trading name of Charterhouse (Audit) Limited. A limited company registered in England and Wales No: 12549400. Registered and Head Office: 166 College Road, Harrow, Middlesex HA1 1RA. Director Nirav Sheth. Charterhouse (Audit) Limited is registered to carry on audit work in the UK and Ireland; Charterhouse (Audit) Limited is associated with Charterhouse (Accountants) Limited.

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 charter-house.net



Please provide details of any State Pension, Widows State Pension or Social Security Benefits received in the year:

Payer Type	Amount	Enclosed

Details of any Gross UK bank interest received:

Bank Account Details	Share if jointly held	Gross amount	Enclosed

Details of Gross interest from Unit Trusts received:

Unit Trust Details	Share if jointly held	Gross amount	Enclosed

Details of Gross National Savings interest received:

Account Details	Share if jointly held	Gross amount	Enclosed

Details of other Gross UK investment income received:

Account Details	Share if jointly held	Gross amount	Enclosed

Certificates of Net income or dividend vouchers for all your investments:

Company	Share holding	Share if jointly held	Net amount	Enclosed

Details of income received and any expenses incurred in respect of any properties you own:

Address	Furnished or Unfurnished?	Share if jointly held	Enclosed

Forms R185 in respect of income received from Trusts:

Name of Trust	Amount	Enclosed

Forms R185 in respect of income received from Estates:

Name of Estate	Amount	Enclosed

Details of UK life insurance gains on Chargeable events certificates received:

Name of Institution	Gain	Enclosed

Details of other UK income received:

Details	Share if jointly held	Amount received	Tax paid	Enclosed

Details of UK capital gains on the sale shares, property or other assets

If you have acquired or disposed of any property, shares, securities, unit trusts or any other assets by any method, (for instance inheritance, stock dividends, rights issues, gift, redemption, sale of rights etc) during the tax year, please let me have the details and any documentation that you hold on original purchase and sale.

Details of assets disposed	Shares sold	Share if Jointly held	Sale proceeds	Enclosed

Details of interest income received from foreign sources:

Foreign Income sources	Share if Jointly held	Gross Amount	Foreign Tax paid	Enclosed

Details of dividends received from foreign sources:

Foreign Company	Share holding & your share if jointly held	Gross amount	Tax paid	Enclosed

Details of pensions received from foreign sources:

Foreign Pension Provider	Amount received	Enclosed

Details of social security benefits received from foreign sources:

Details of Foreign Social Security Benefit	Amount received	Enclosed

Details of income received and any expenses incurred in respect of foreign properties:

Address	Share if Jointly held	Enclosed

Details of life insurance gains received from foreign sources:

Details	Gain	Enclosed

Details of other income received from foreign sources:

Details	Share if Jointly held	Amount	Enclosed

Details of the amounts of charitable donations payments made:

Name of Charity	Amount	Enclosed

Details of the amounts of pension contributions made, (both individual and employer):

Pension Provider	Individual or Employee Amount	Employer Amount	Enclosed

Details of any other income or capital gains you received during the tax year not mentioned above:
