

PERSONAL TAX ORGANISER 2023/24



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Personal Tax Organiser

This is your FREE Personal Tax Organiser for the tax year to 5 April 2024. This organiser will help you assemble your tax information.

We hope you will find it useful and informative.

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

If you are not sure whether an item is relevant to your tax return put it in the folder with an explanatory note.

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.

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 us as soon as you have completed your Tax Organiser.

We request that you forward all your paperwork to us **by 31st August 2024**.

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

Name:

Address:

Address:

Postcode:

Email:

Telephone:

Mobile:

National Insurance No:

Tax Reference No (UTR):

Date of Birth:

Spouse's Name:

Spouse's Date of Birth:

Spouse Information – if applicable

Name:

Address:

Address:

Postcode:

Email:

Telephone:

Mobile:

National Insurance No:

Tax Reference No (UTR):

Date of Birth:

Spouse's Name:

Spouse's Date of Birth:

Filing StatusMarital Status: Date Married (if after 5 April 2023):Has there been a transfer of the Marriage Allowance? (Please circle): Y / N

Residence Status (amend as appropriate):

- I am Resident in UK
- I am Resident in:

If you have any children (up to age 19) please provide names and dates of birth:		Tick this Box	
Name:	DOB:		
Name:	DOB:		
Name:	DOB:		
If you are married and your spouse 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 April 2023		Tick this Box	
Also attach copy of death certificate		Tick this Box	

Your 2023/24 Tax Return Organiser		Tick Enclosures
1. Employment		
Please state your occupation and your current employer's name:		
Enclose form P60 for the year 2023/24		
If you make pension contributions through the payroll, please enclose your month 12 payslip		
Date employment commenced, if after 5 April 2023		
If you are a director, is the Company a "Close Company"? Yes / No:		
Did you work from home during the year 2023/24? Yes / No		
If you did work from home, was there an office available to you to work from? 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 for the year 2023/24 for any benefits you received in your employment.		
3. Self-Employment		
Specify the nature of your business:		
Provide relevant accounting records		
Is this your first, second, or last year/period of trade?		
Do you work from home?		
4. State Pension Income		
Enter the weekly/monthly rate.		
Rate payable between 6 April 2023 and 5 April 2024 £		
If your pensions started after 6 April 2023 enter start date here:		

Your 2023/24 Tax Return OrganiserTick
Enclosures**5. Other Pension Income**

For each other pension that you receive please write the payer's name & address below and enclose your form P60 2023/24.

Payer name/address:

6. Future Pensions

If you expect to receive a new pension after 5 April 2024 please provide the following information:

- Expected start date:
- Amount of Pension £
- Is this weekly, 4 weekly, monthly, quarterly or annual?

7. Interest Income

Obtain a certificate of interest received for each source for the period 6 April 2023 to 5 April 2024 and enclose these certificates.

Please state how many certificates are enclosed:

8. Dividend Income

Show the total of dividends received for the period 6 April 2023 to 5 April 2024 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 April 2023 to 5 April 2024 please enclose a schedule showing description of item and date purchased, price paid, date sold and net sale proceeds.

A separate capital gains tax return is required for the sale of residential property, if any tax is payable. This return needs to be submitted and any tax due paid within 60 days of the completion of the sale.

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.

Your 2023/24 Tax Return Organiser		Tick Enclosures
11. Loans		
Obtain a certificate of interest paid from your lender for any loans eligible for tax relief for the period 6 April 2023 to 5 April 2024 and enclose this certificate.		
Enter the name and address of your Lender below:		
What was the loan used for?		
12. Pension / Retirement		
If you made any pension contributions during the period 6 April 2023 to 5 April 2024 please enclose a list stating name of pension company, policy number & amount paid during this period.		
Enclose form PPCC for all policies commenced after 6 April 2023, policy number & 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 furnished or unfurnished or holiday lets.		
14. 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 etc.		
Please detail any gift aid donations made in the year 6 April 2023 – 5 April 2024		
15. Child Benefit		
If you received any child benefit in the year 6 April 2023 – 5 April 2024 please tick the box. We may need to ask you additional questions in due course.		
16. Student loans		
Please advise of any student loans outstanding and the plan type.		

Your 2023/24 Tax Return Organiser	Tick enclosures
17. Crypto Currencies	
Please provide any crypto currency transactions.	
18. Any other information	
Please provide any other relevant information here:	