PLANET ACCOUNTING
ACCOUNTANTS & BOOKKEEPERS

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CIS subcontractor information form

Everything I need to prepare your tax return and claim back any CIS you have overpaid. Rough figures are fine to start with.

How to send it back
Fill it in on screen or print it. Email it to vincent@tpacc.uk, or WhatsApp a photo to 07903 793886.
Prefer to do it online? Go to tpacc.uk/client-forms.html. Rough figures are fine. Questions marked * are needed.

Have these to hand (tick what you are sending)

- ☐ Monthly payment and deduction statements from every contractor
- ☐ Receipts for tools, materials, PPE and van costs
- ☐ A mileage log, if you keep one
- ☐ Bank statements
- ☐ Van finance or lease agreement
- ☐ Any letters from HMRC

01 ABOUT YOU

Full name *

Date of birth *

National Insurance number *

For example QQ 12 34 56 C

Unique Taxpayer Reference (UTR)

10 digits, on letters from HMRC. Leave blank if you don't have one.

Are you registered for self assessment?

- ○ Yes
- ○ No
- ○ Not sure

Home address *

Postcode *

Phone *

Email *

Trading name, if you use one

How much do contractors deduct?

- ○ 20% (registered)
- ○ 30% (not registered)
- ○ Nothing (gross payment status)
- ○ Not sure

02 TAX YEAR

Which tax year is this for? *

- ○ 2025/26 (6 April 2025 to 5 April 2026)
- ○ 2024/25 (6 April 2024 to 5 April 2025)
- ○ 2023/24 (6 April 2023 to 5 April 2024)
- ○ 2022/23 (6 April 2022 to 5 April 2023)
- ○ More than one year

03 CONTRACTORS YOU WORKED FOR

Totals for the year, from your monthly payment and deduction statements.

Contractor name	Gross paid	Materials	CIS deducted
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
	£	£	£
Totals	£	£	£

04 YOUR COSTS FOR THE YEAR

Rough figures are fine. Keep your receipts.

How do you want to claim for your van?

- ○ Actual costs
- ○ Mileage rate
- ○ Not sure

Business miles driven

Fuel

£

Van insurance and tax

£

Repairs and servicing

£

Van finance or lease payments

£

Tools and equipment

£

PPE and workwear

£

Materials you bought

£

Phone

£

CSCS cards, tickets and training

£

Public liability insurance

£

Subcontractors you paid

£

Accountancy fees

£

Other costs

£

What the other costs were

05 OTHER INCOME

Did you have any other income?

- Yes
- No

Details

A job (with P60 figures), rental income, savings interest, anything else.

06 PREVIOUS YEARS

CIS refunds can be claimed for up to four years back.

Have you missed any tax returns or refunds in the last four years?

- Yes
- No
- Not sure

Which years?

07 STUDENT LOAN AND PAYMENTS

Student loan

- None
- Plan 1
- Plan 2
- Plan 4 (Scotland)
- Plan 5
- Postgraduate loan
- Not sure

Payments on account already made

£

08 BANK DETAILS FOR ANY REFUND

Only used so HMRC can pay any refund straight to you. The account must be in your name.

Name on the account

Sort code

6 digits

Account number

8 digits

09 ANYTHING ELSE I SHOULD KNOW?

Anything else

Letters from HMRC, changes this year, questions you want to ask me.

10 DECLARATION

As an accountant supervised by HMRC for anti-money laundering, I'll also need to see photo ID and a recent proof of address before I start. I'll ask for these separately.

- [ ] I confirm the information on this form is correct and complete to the best of my knowledge.
- [ ] I agree to Planet Accounting using these details to prepare my accounts and tax returns and to deal with HMRC for me.

Date

Your details are used only to prepare your accounts and tax returns and to deal with HMRC for you. They are kept securely and never shared or sold. Planet Accounting is registered with the ICO (ZC223124).