PLANET ACCOUNTING
ACCOUNTANTS & BOOKKEEPERS

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# Self assessment information form

Everything I need to prepare your tax return. Fill in what you can. Rough figures are fine, and I'll check the details with you.

**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)**

- ☐ P60 and any P45 or P11D from your job
- ☐ Sales invoices and receipts for business costs
- ☐ Dividend vouchers and interest statements
- ☐ Any letters from HMRC
- ☐ Bank statements for any business account
- ☐ Rent statements and letting agent reports
- ☐ Pension contribution statements

## 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 ***

## 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 YOUR INCOME

Tick everything you had in the tax year.

**Income you had**

- ☐ Self-employed or sole trader
- ☐ Partnership
- ☐ Pension income
- ☐ Child Benefit (if you or your partner earn over £60,000)
- ☐ Employment (a job with a P60)
- ☐ Dividends
- ☐ Sold shares, property or crypto
- ☐ Rental property
- ☐ Savings interest
- ☐ Foreign income

## 04 SELF-EMPLOYMENT

Only if you are self-employed.

**Business or trading name**

**What you do**

**Date you started, if this year**

**Total sales or income**

£

**Vehicle and travel costs**

£

**Or business miles driven**

**Tools and equipment**

£

**Materials and stock**

£

**Phone and internet**

£

**Working from home**

£

**Business insurance**

£

**Accountancy and professional fees**

£

**Wages and subcontractors**

£

**Advertising**

£

**Other costs (please describe)**

**CIS tax deducted, if any**

£

Use the CIS form instead if most of your work is CIS.

## 05 EMPLOYMENT

Only if you had a job. The figures are on your P60.

**Employer name**

**Total pay**

£

**Tax deducted**

£

**Company car or other benefits (P11D)**

## 06 RENTAL PROPERTY

Only if you rent out property.

**Number of properties**

**Your share if jointly owned**

For example 50%

**Total rent received**

£

**Running costs (repairs, agent, insurance)**

£

**Mortgage interest**

£

**Property addresses**

## 07 OTHER INCOME

Leave blank anything that does not apply.

**Dividends**

£

**Savings interest**

£

**Pension income**

£

**Partnership share of profit**

£

**Shares, property or crypto you sold**

What you sold, when, what you sold it for and what it cost.

**Foreign income**

## 08 ALLOWANCES AND RELIEFS

**Personal pension contributions you paid**

£

**Gift Aid donations**

£

**Student loan**

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

**Marriage Allowance**

- Yes
- No
- Not sure

**Child Benefit received in the year**

£

**Does your partner earn more than you?**

- Yes
- No
- No partner

## 09 PAYMENTS TO HMRC

**Payments on account already made**

£

**Any letters, penalties or debts with HMRC?**

## 10 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

## 11 ANYTHING ELSE I SHOULD KNOW?

**Anything else**

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

## 12 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).