

Before you start filling in the screens, it is worth collecting together the documentation you need to refer to. Below is a check list of the various information required. We recommend that you print out the list and keep a hard copy.

**Note**

When completing the screens you may be asked to enter an amount of money. The Inland Revenue asks you not to include pence in your tax return. Round down the income you enter to the nearest £ and round up your tax credits and tax deductions. However, both TaxCalc and the Revenue's own computers will work out your tax in pounds and pence.

Personal details

If you are employed

If you are self-employed

If you get a pension

If you get state benefits

If you get income from property

If you have income from savings and investments

If you are divorced or separated

If you paid interest on a loan qualifying for tax relief

If you made pension contributions

If you want to claim any other tax-allowable deductions

If you made a capital gain on parting with property or investments

**Personal details**

Tax reference number and your tax office address (should be on your Tax Return).

Your National Insurance number (should be on your payslip or documentation previously received from the Inland Revenue).

If you are claiming the blind person's allowance, the name of the local authority or scheme with which you are registered.

Your agent's reference number and telephone number (if you have one).

**If you are employed**

Your P60 which your employer should give you no later than 31 May 1998.

A list of your taxable fringe benefits. If you earn at a rate of £8,500 a year or more, or are a director, your employer must give you a copy of the form **P11D** by 6 July 1998. This is the form on which your employer discloses your perks to your tax office.

A list of fixed expense allowances or expenses for which you've been reimbursed

(also on your P11D).

A list of any allowable expenses for which you haven't been reimbursed.

Details of redundancy or other payments you received when you left your job.

Confirmation from your employer that, if you received money from a profit-sharing scheme, the scheme is approved.

A list of the dates when you were working abroad if you want to claim the foreign earnings deduction.

If you left a job, any copy you kept of your **P45** (although you should have already passed the original on to your new employer or your tax office).

Details of any unpaid tax for previous years being collected via PAYE - your PAYE coding notice will give details.

### **If you are self-employed**

A set of accounts, if you have them - otherwise your gross turnover and expenses.

Records of any capital equipment you may have bought or sold which qualified for capital allowances.

Details of any Enterprise Allowance received.

A copy of your Statement of Account showing payments of tax already made for 1997-98.

### **If you get a pension**

Amounts of any state pension you were entitled to (contact your DSS office if you don't know).

Records of any personal pension or employer's pension - you should have a **P60** for any pension paid under PAYE, and a statement from anyone who paid you a personal pension.

### **If you get state benefits**

A statement of amounts received (from your benefit office)

If you were unemployed, a **P60U** (from your benefit office)

### **If you get income from property**

Records of payments (eg rent) due and received.

Records of allowable expenses incurred - which may mean going back through gas, electricity bills etc.

Records of any capital equipment you may have bought or sold which qualified for capital allowances (for some types of property only).

A copy of your Statement of Account if you have already made any tax payments for 1997-98.

## **If you have income from savings and investments**

Tax vouchers which came with dividends or distributions - these may have been sent direct to your bank with the dividends or distributions.

If you took shares in place of cash dividends, you will need the offer letter showing the number of shares and their market value at the time of issue.

Notes of interest received on savings accounts - go back through your statements or contact the bank or building society. If you have received interest without tax being deducted, ask for a statement of interest not taxed.

For income from abroad, do not forget the costs of expenses incurred abroad in managing or collecting it; details of any foreign tax deducted; the exchange rate when the income was paid to you if you received it in foreign currency; the cost of converting it into sterling (if reasonable).

If you are involved with a trust or settlement, the name of the trust and Inland Revenue file reference (or names and addresses of the trustees). The certificate received from the trustees (forms R185 or R185E) should give details of your income from the trust and tax paid.

## **If you are divorced or separated**

Details of any enforceable maintenance payments received or paid, together with the date of the original and any further court orders or other agreements.

Details of payments in 1988-89, if relevant.

## **If you paid interest on a loan qualifying for tax relief (but not included in the MIRAS scheme)**

Your latest mortgage statement and a certificate of interest paid (from the lender).

For other loans, a certificate of interest paid.

### **Note**

You no longer have to give details of loans in the MIRAS scheme.

## **If you made pension contributions**

Any personal pension contribution certificate (including insurance linked to the pension).

FSAVC certificate.

Self-employed premium certificate if you took out your pension plan before 1 July 1988 (this is what it is called even if you are an employee).

## **If you want to claim any other tax-allowable deductions**

If you are claiming the cost of training which qualifies for relief, a letter or receipt from the college or institution, showing the tuition fees paid.

## **If you made a capital gain on parting with property or investments**

Dates of when you disposed of the asset, together with its disposal proceeds.

If you owned the asset before 31 March 1982, the market value on that date. For quoted shares, prices are published in the Stock Exchange Daily Official List.

The date of when you acquired the asset and its acquisition cost at that time, unless you have already made the irrevocable election to have all your assets treated as if acquired on 31 March 1982.

Details of any allowable expenses incurred (but pre-1982 expenses are ignored if you have made the irrevocable election described above).

RPI figures for dates of acquisition, disposal and the dates the expenses were incurred.

For RPI figures after February 1998 call the Office for National Statistics recorded message on 0171 533 5866, or check the ONS web site at [www.ons.gov.uk/releases/rpi.htm](http://www.ons.gov.uk/releases/rpi.htm).

	<b>1982</b>	<b>1983</b>	<b>1984</b>	<b>1985</b>	<b>1986</b>	<b>1987</b>	<b>1988</b>	<b>1989</b>
<b>Jan</b>		82.61	86.84	91.20	96.25	100.00	103.30	111.00
<b>Feb</b>		82.97	87.20	91.94	96.60	100.40	103.70	111.80
<b>Mar</b>	79.44	83.12	87.48	92.80	96.73	100.60	104.10	112.30
<b>Apr</b>	81.04	84.28	88.64	94.78	97.67	101.80	105.80	114.30
<b>May</b>	81.62	84.64	88.97	95.21	97.85	101.90	106.20	115.00
<b>Jun</b>	81.85	84.84	89.20	95.41	97.79	101.90	106.60	115.40
<b>Jul</b>	81.88	85.30	89.10	95.23	97.52	101.80	106.70	115.50
<b>Aug</b>	81.90	85.68	89.94	95.49	97.82	102.10	107.90	115.80
<b>Sep</b>	81.85	86.06	90.11	95.44	98.30	102.40	108.40	116.60
<b>Oct</b>	82.26	86.36	90.67	95.59	98.45	102.90	109.50	117.50
<b>Nov</b>	82.66	86.67	90.95	95.92	99.29	103.40	110.00	118.50
<b>Dec</b>	82.51	86.89	90.87	96.05	99.62	103.30	110.30	118.80

	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>
<b>Jan</b>	119.50	130.20	135.60	137.90	141.30	146.00	150.20	154.40
<b>Feb</b>	120.20	130.90	136.30	138.80	142.10	146.90	150.90	155.00
<b>Mar</b>	121.40	131.40	136.70	139.30	142.50	147.50	151.50	155.40
<b>Apr</b>	125.10	133.10	138.80	140.60	144.20	149.00	152.60	156.30
<b>May</b>	126.20	133.50	139.30	141.10	144.70	149.60	152.90	156.90
<b>Jun</b>	126.70	134.10	139.30	141.00	144.70	149.80	153.00	157.50
<b>Jul</b>	126.80	133.80	138.80	140.70	144.00	149.10	152.40	157.50
<b>Aug</b>	128.10	134.10	138.90	141.30	144.70	149.90	153.10	158.50
<b>Sep</b>	129.30	134.60	139.40	141.90	145.00	150.60	153.80	159.30
<b>Oct</b>	130.30	135.10	139.90	141.80	145.20	149.80	153.80	159.50
<b>Nov</b>	130.00	135.60	139.70	141.60	145.30	149.80	153.90	159.60
<b>Dec</b>	129.90	135.70	139.20	141.90	146.00	150.70	154.40	160.00

**1998**

**Jan** 159.5

0

**Feb** 160.3

0

