

What To Keep For Your Tax Return

by

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It is recommended that you keep anything relating to the transfer of money whether it is income or expenditure to replace a light bulb for your business.

Below is listed some of the common items you should be thinking about in the areas of income and expenditure. **ALWAYS keep RECEIPTS**

Income Items

If you get any of the following.....	You must keep these.....
Salary / Wages	P60 P45 Payslips Notice of coding
Benefits in Kind <i>E.g. Company car, medical insurance</i>	P11D
State Benefits <i>E.g. Unemployment benefit, allowances</i>	Statements of payments to you from DSS
Pensions <i>State pension</i>	Statement of pension payments by DSS or pension fund
<i>Other pensions</i>	
Share Options	Share option documents from your Employer
Other Earnings <i>Tips, commissions</i>	Relevant vouchers or documentation (<i>Yes...tips are taxable.....!!!</i>)
Expenses not reimbursed By your employer,	Expense receipts or vouchers
Self-employment & Partnerships	Financial statements from Self Employment & Partnership
Savings & Deposit accounts <i>Banks</i>	Interest certificates
<i>Building Societies</i>	Interest certificates
<i>National Savings</i>	Interest details

Share Holdings*Dividends*

Dividend vouchers

Unit Trusts

Unit Trust vouchers

Other sources

Other

Relevant vouchers and receipts

Land & Property

Furnished lettings

Invoices or receipts

Holiday accommodation

Overseas

Foreign income documentation

Trusts & Settlements

Trust tax vouchers

Other Sources

Royalties

Royalty income & expenses

Expenditure Items**If you spent on any of the following.. You must keep**

Mortgage or loans

Mortgage or interest statements

Vocational training

Training papers

Charitable covenants

Deeds of covenant

Gift aid

Gift aid details

Venture capital trust shares

VCT Certificates

Shares

Contract notes

Land & property

Completion statements

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