

Other information that we require to complete your tax return

Please provide details of all of income or gains, including:

- income from investments, such as shares, bonds, bank deposit accounts and so on;
- any one-off income amounts you have received, for example commissions, even though these may not come from your regular employment;
- any rents or other income that you receive from property;
- proceeds from the disposal of life insurance policies: the insurance company will normally provide a “chargeable events certificates”. Please attach a copy of this;
- details of any assets that you have disposed of, including shares, investments, any interest in real estate and so on;
- income from any trust or estate; and
- if you have received any income, or realised any gain, that has suffered tax outside the UK, please provide full details of that tax as you may be entitled to relief against your UK tax.
- If you or your spouse have received child benefit, please set out the amount that you received during the year.

You should include details of income or gains arising anywhere in the world, in any currency, regardless of whether the proceeds have been brought into the UK, even if that income or gain has been taxed in a foreign jurisdiction. Please identify each source of income and the country from which it comes.

Residence and domicile

If you were not resident or not domiciled in the UK during the year, and this makes a difference to your tax affairs (domicile only affects your tax liability if you want to elect for your non-UK source income and gains to be taxed on the remittance basis) please provide details.

Offshore companies and trusts

If you own shares in a non-UK company (other than as part of an investment portfolio), or if you have ever put any money into a non-UK company or trust, please provide full details, unless you are sure that we already have these. If you are not sure that we have the details, please provide them.