

Name: \_\_\_\_\_

Contact No: \_\_\_\_\_

### **2010 Tax Return Checklist**

- |   |  |                          |
|---|--|--------------------------|
| 1 | P60 forms for year ended 31st December 2010  | <input type="checkbox"/> |
| 2 | Mortgage interest certificates for all relevant loans including your principal private residence   | <input type="checkbox"/> |
| 3 | Dividend counterfoils for dividend income received during year ended 31st December 2010  | <input type="checkbox"/> |
| 4 | Details of any other income earned for 2010 i.e. deposit int, credit union dividends, foreign dividend income etc (including relevant interest certificates)                     | <input type="checkbox"/> |
|   | In connection with rental income, please furnish details including income, expenses & relevant mortgage interest certificates  |                          |
| 5 | Summary of medical expenses incurred during the year   | <input type="checkbox"/> |
| 6 | Service charges paid year ended 31st December 2009   | <input type="checkbox"/> |
| 7 | Provide details of chargeable assets including properties & shares disposed of during year ended 31 December 2010 including:   | <input type="checkbox"/> |
|   | <i>(i) In relation to shares, please forward copies of relevant purchase/sale contract notes.</i>  | <input type="checkbox"/> |
|   | <i>(ii) In connection with property transactions, please forward copy of front page of contract setting out date, cost, etc.</i>   | <input type="checkbox"/> |
|   | <b>NB: If any chargeable assets were disposed of since 01/01/2011 - 30/11/2011, please provide details, as preliminary capital gains tax must be paid by Mid - December 2011</b> |                          |
| 8 | Any other documentation/information you consider relevant to complete your 2010 tax return   | <input type="checkbox"/> |