

# **DATA COLLECTION SHEET**

## **INCOME TAX RETURN 2010**

**(Year Ended 31<sup>st</sup> December 2010)**

**Prepared by:** \_\_\_\_\_

**Taxpayer:** \_\_\_\_\_

**Date:** \_\_\_\_\_

	<b>Comments</b>
<p><b>DOCUMENTATION AND INFORMATION REQUIRED:</b></p> <ol style="list-style-type: none"><li>1. Relevant Forms P60s for year ended 31 December 2010.</li><li>2. If you underpaid PAYE and the Revenue collected this underpayment by reducing your 2010 certificate of tax credits, please advise of the amount of the underpayment.</li><li>3. Mortgage interest certificates for <u>all</u> relevant loans including your principal private residence.</li><li>4. Dividend counterfoils for dividend income received during year ended 31 December 2010.</li><li>5. Details of any other income earned during the period, e.g. deposit interest, credit union dividends, etc.</li><li>6. Details of benefits in kind (company car, VHI, etc.), if applicable. In relation to your company car, we require the following information:<ol style="list-style-type: none"><li>(i) Make and model of the car.</li><li>(ii) Original market value of the car.</li><li>(iii) Date the car was provided.</li><li>(iv) Confirm if your employer pays all the running costs or whether you reimburse certain expenses e.g. private fuel</li><li>(v) Annual mileage.</li><li>(vi) Business mileage.</li></ol>In relation to VHI payments, we require the <u>gross</u> amount paid.</li><li>7. Details of any taxable benefits not taxed at source under PAYE e.g. PRSAs, Shares, etc.</li><li>8. Details of pension contributions, permanent health insurance and BES investments, etc.</li></ol>	

9. In relation to any rental properties, we require a list of the properties including the date acquired, cost and details of borrowings, including:
- (i) Name of Financial Institution.
  - (ii) Amount of the loan.
  - (iii) Loan Account No.
  - (iv) Mortgage interest certificate for each property.
  - (v) Mortgage protection premium paid.
  - (vi) Summary of rental income and related expenses for each property (see attached blank rental computation for guidance purposes).
10. If you took out a PRSA during year ended 31<sup>st</sup> December 2010, please provide the following details:
- (i) The date the PRSA was taken out.
  - (ii) The monthly amount invested.
  - (iii) Confirm if your employer pays a % towards it, and if so, the relevant amount paid.
  - (iv) Your date of birth.
  - (v) Please advise if you pay it directly to a PRSA provider or whether it is deducted from your salary.
  - (vi) Please provide documentation from the PRSA provider as to what type of PRSA applies.
11. Please advise of the service charges paid on your principal private residence during year ended 31<sup>st</sup> December **2009** (relief is granted on a preceding year basis).
12. If you incurred medical expenses including non routine dental treatment, please provide us with the relevant receipts.
13. In relation to claiming the Home Carer's Credit, please provide us with your child/children's date(s) of birth.
- If your child was over 18 during the tax year, please advise if he/she was attending college, and confirm if you were in receipt of child benefit in respect of that child while he/she was attending college.
14. Details of any other credits to which you may be entitled e.g. relief in respect of tuition fees paid, trade union subscription, etc.
15. Please provide details of any property based incentives on which relief is due in 2010.

16. Provide details of chargeable assets acquired and/or disposed of during year ended 31 December 2010.

(i) In relation to shares, please forward copies of relevant purchase/sale contract notes.

(ii) In connection with property transactions, please forward copy of front page of contract setting out date, cost, etc.

**NB: If any chargeable assets are disposed of during the period 1/1/2009 to 30/9/2009, please provide details, as preliminary capital gains tax must be paid by 31<sup>st</sup> October 2010.**

17. Any other documentation/information you consider relevant to the completion and filing of your 2010 tax return.

18. Please confirm if you are registered with the Private Residential Tenancies Board (PRTB). If you are please give us details and also your registration number.