

Your 2024-25 tax year Self-Assessment Questionnaire

It's that time again, we're getting ready to prepare and submit your tax return but we need your help.

We've introduced an option to submit everything on line. It's useful to review the items on the next page, just to make sure you have everything you need.

To submit on line please visit: www.hippey.co.uk/sa

Some really important notes:

If you have or are likely to incur a capital gain on property that is not your main residence, you must report this to HMRC within 60 days. If you're unsure if this applies to you get in touch with us as soon as possible.

HMRC have now changed the definition of 'working from home' and how any tax allowance might apply to this. We may ask for further details depending on your circumstances.

Please gather together documents that cover payments or receipts that were made between 6th April 2024 & 5th April 2025. Where you have paid or received money or funds monthly, you might need to obtain more than one document that will cover the whole period.

Pensions:

If you receive a state pension please provide your annual DWP payment notice. Not all state pensions are paid at the same rate which can cause errors in calculating your annual income.

If you made payment(s) into a pension and intend to claim tax relief, we will need to see details of the pension scheme, tax status and the payments made over the relevant period. We are aware that some schemes may already be claiming tax relief on your behalf or payments have already been made as net tax relief.

Payment:

Once we receive your completed questionnaire and any supporting documents, we will send a pro-forma invoice to you. We ask that we receive full payment prior to submission of your tax return to HMRC.

Typical information required for Self-Assessment.

Income / Outgoings	Information and / or Documents Required	Tick if enclosed
Earnings	Copies of Forms P60 and P11D Details of any share options in our possession already.	
State and other Pensions	State pension statement, P60's or similar documentation for the year.	
All other state benefits	Full details are required including any supporting documents.	
Property Income	Rent statements etc, details of all expenses with invoices. <i>Rental details must be kept for five years.</i>	
Bank and Building Society Interest	Interest certificates, bank statements, passbooks, etc (Don't forget interest on current accounts and any non-UK accounts).	
Dividends etc	Dividend and interest counterfoils, contract notes and details of rights/bonus issues	
Maintenance Payments	Copies of new orders and details of all payments made or received during the year.	
Trust Income	Forms R185 or a copy of the Trust accounts.	
Annuities, chargeable events and gains on life policies.	Chargeable event certificates or similar supporting documentation.	
Employment Expenses	All details and any supporting documents	
Loans for shares in or money introduced to your company or partnership	A note of all loans existing during the year with supporting documentation including interest certificates obtainable from lenders redeemed or taken out during the year with supporting documentation and forms obtainable from lenders.	
Disposal of any valuable assets including principal private residence.	Full details including completion statements, contract notes and other documentation (if not dealt with under dividends, etc).	
Charitable, covenants, and gift aid.	Please provide details of any donations where you have opted in to Gift Aid.	
Child Benefit	Do you or anyone you reside with receive child benefit, whether paid or not.	
Blind persons	Date of registration and local authority with which registered.	
Pension policies	Full details of payments during year, with supporting pension premium certificates if new policies have been effected or existing premiums increased.	
EIS or VCT investments	The relevant tax certificates provided by the company.	
Any other matters	Details of any other income/outgoings which may have a bearing on your tax return. If in any doubt, please supply details and we'll take a look.	

Please return this form to us, along with your supporting documents. If you would also like to book an initial meeting please visit hippey.co.uk/sa