

What We Need For a Self Assessment Tax Return

Below is an example of an acceptable Self Assessment Tax Return. We need a full copy of all pages of the tax return you have most recently Submitted to HMRC.

The document you provide must show:

- Tax Year Period
- Claimant's name(s)/full address
- Confirmation of employment, self employment, company director status
- All pages of your Tax Return which relate to each employment status ticked.

If you're unsure on how to get your statements for this, please follow the steps below:

- Log in to your HMRC account.
- Go to your submitted Tax Returns.
- Download a PDF copy of your most recently submitted return.

If you screenshot the images from your phone, YOU MUST copy all sections not just the Tax Calculation for the period. This will be time consuming and if unclear then it will not be accepted. The document should look like the example shown below:

What makes up your tax return

To make a complete return of your taxable income and gains for the year to 5 April 2019 you may need to complete some separate supplementary pages. Answer the following questions by putting 'X' in the 'Yes' or 'No' box.

<p>1 Employment Were you an employee, director, office holder or agency worker in the year to 5 April 2019? Please read the notes before answering. Fill in a separate 'Employment' page for each employment, directorship and so on. On each 'Employment' page you complete, enter any other payments, expenses or benefits related to that employment. Say how many 'Employment' pages you are completing in the 'Number' box below.</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Number <input type="text" value="0"/></p> <p>2 Self-employment If you worked for yourself (on your 'own account' or in self-employment) in the year to 5 April 2019, read the notes to decide if you need to fill in the 'Self-employment' pages. You may not need to if this income is up to £1,000. Do you need to fill in the 'Self-employment' pages? Fill in a separate 'Self-employment' page for each business. On each 'Self-employment' page you complete, enter any payments or expenses related to that business. Say how many businesses you had in the 'Number' box below. (Answer 'Yes' if you were a 'Name' at Lloyd's)</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Number <input type="text"/></p> <p>3 Partnership Were you in a partnership? Fill in a separate 'Partnership' page for each partnership you were a partner in and say how many partnerships you had in the 'Number' box below.</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Number <input type="text"/></p> <p>4 UK property If you received income from UK property (including rents and other income from land you own or lease out), read the notes to decide if you need to fill in the 'UK property' pages. You may not need to if this income is up to £1,000. Do you need to fill in the 'UK property' pages?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>5 Foreign If you: • were entitled to any foreign income • have, or could have, received (directly or indirectly) income, or a capital payment or benefit from a person abroad as a result of any transfer of assets • want to claim relief for foreign tax paid read the notes to decide if you need to fill in the 'Foreign' pages. You may not need to if your only foreign income was from land and property abroad up to £1,000. Do you need to fill in the 'Foreign' pages?</p> <p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>	<p>6 Trusts etc Did you receive, or are you treated as having received, income from a trust, settlement or the residue of a deceased person's estate? This does not include cash lump sums/transfer of assets, otherwise known as capital distributions, received under a will.</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>7 Capital gains summary If you sold or disposed of any assets (for example, stocks, shares, land and property, a business), or had any chargeable gains, read the notes to decide if you have to fill in the 'Capital gains summary' page. If you do, you must also provide separate computations. Do you need to fill in the 'Capital gains summary' page and provide computations?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/> Computation(s) provided <input type="checkbox"/></p> <p>8 Residence remittance basis etc Were you, for all or part of the year to 5 April 2019, on one or more of the following: • Not resident • not domiciled in the UK and claiming the remittance basis • dual resident in the UK and another country?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>9 Additional information Some less common kinds of income and tax reliefs, for example Married Couple's Allowance, Life Insurance gains, chargeable event gains, Seafarer's Earnings Deduction and details of disclosed tax avoidance schemes, should be returned on the 'Additional information' pages. Do you need to fill in the 'Additional information' pages?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If you need more pages If you answered 'Yes' to any of questions 1 to 9, please check to see if within this return, there's a page dealing with that kind of income or gain. If there's not, you'll need separate supplementary pages. Do you need to get and fill in separate supplementary pages?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If 'Yes', go to www.gov.uk/taxreturnforms to download them.</p>
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