



## MDJ Services Ltd - Tax checklist 2023/24

Please complete all of the following tax return questions in connection with the period 6th April 2023 to 5th April 2024 and we will add these answers to your tax return. If you have any issues please contact us on 01323 646477 or e-mail [post@mdjservices.co.uk](mailto:post@mdjservices.co.uk)

\*Required

1. What is your name\*
2. Email address\*
3. Has your marital status changed in the year? If so please give details.

### **Employment income**

4. Did you have any PAYE income or employment benefits, or hold any directorships in the year? If so give details.
5. If yes to the above, please provide copies of your P60 or P45, relevant PAYE coding notices and your P11D if appropriate.

### **Self-employment income**

6. Were you self-employed, either solely or in partnership during the year? If so give details.

7. If yes to either of the above, please provide copies of your accounting records for the year either by email to [post@mdjservices.co.uk](mailto:post@mdjservices.co.uk) or in paper form to the MDJ office.

### Property income

8. Did you receive any rent or other income from land and property? If so give details.

9. If yes to the above, please provide copies of your rental income and expenditure records for the year either by email to [post@mdjservices.co.uk](mailto:post@mdjservices.co.uk) or in paper form to the MDJ office.

### Other income

10. Did you receive any of the following in the year? *Please tick all that apply.*

Bank/building society interest	<input type="checkbox"/>
Interest on compensation/PPI claims	<input type="checkbox"/>
Dividends from UK Companies	<input type="checkbox"/>
Dividends from foreign sources	<input type="checkbox"/>
State retirement pensions (regular payments)	<input type="checkbox"/>
State retirement pensions (lump sums)	<input type="checkbox"/>
Other/private pensions	<input type="checkbox"/>
Income from a digital marketplace e.g. Ebay	<input type="checkbox"/>
Other (please give details)	<input type="checkbox"/>

11. If yes to any of the above, please provide copies of any relevant statements/documentation, or note details below.

12. Details of other income. Please leave all details of income received, dates received, source (country/provider), any tax deducted at source etc.

### Capital gains

13. Did you sell, dispose or gift any of the following in the year? *Please tick all that apply.*

Properties, including your own home ☐

Stocks or shares (including Venture Capital, Seed Enterprise Investment Scheme) ☐

Other capital assets ☐

*Note that the deadline for submitting capital gains tax returns for UK residential properties is 60 days from completion date. Any questions please let us know.*

14. If yes to any of the above, please upload copies of any relevant statements/documentation, or note details below.

15. Details of capital gains. Please leave all details of disposals, including gains received, dates received, recipient, any deductible costs etc.

**Expenses and outgoings**

16. Did you pay any personal pension contributions or retirement annuity premiums? If so give details. If deducted from wages, please specify whether deducted from gross or net pay.

17. Did you make any charitable Gift Aid payments? If so give details.

18. Did you pay any professional subscriptions or personally pay any other expenses relating to your employment that have not been reimbursed by your employer? If so give details.

**Any other information**

19. Have you received notification regarding the repayment of a student loan? If so give details.

20. Do Scottish rates of tax apply to your affairs? If so give details.

21. Did you receive any income from any trust or estate? If so give details.

22. Do you or your partner claim child benefit? If so give details.

23. Have you or your spouse applied to claim Marriage Allowance? If so give details.

24. If no to the above, does your spouse earn less than £12,570 of taxable income? If so give details.

25. If you have changed address please let us know your new address below:

26. Please provide any other information that may be relevant to your tax return below:

*Thank you for your time and patience in filling out this form*

*MDJ Services Limited*

*Registered address: Unit A6, Chaucer Business Park, Dittons Road, Polegate, East Sussex, BN26 6QH*

*Registered in England & Wales number: 3352385*