### CT61 completion REVIEW

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| Client: Click or tap here to enter text. |
| Year end: Click or tap to enter a date. | Ref: Click or tap here to enter text. |

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| --- | --- | --- | --- |
|  |  | **Yes / No /N/A** | **Comments** |
| 1. | Has the return been made up to a calendar quarter, or the company’s year-end? | Choose an item. | Click or tap here to enter text. |
| 2. | Have the correct income tax rates been applied? | Choose an item. | Click or tap here to enter text. |
| 3. | Has the last return period, and any periods for which returns were not submitted, been reviewed for carry forward items? | Choose an item. | Click or tap here to enter text. |
| 4. | Confirm that there are no outstanding returns for prior periods? | Choose an item. | Click or tap here to enter text. |
| 5. | Have all of the partner’s review queries been cleared and actioned? | Choose an item. | Click or tap here to enter text. |
| 6. | Does the draft letter advise the client of the tax due, with the due date? | Choose an item. | Click or tap here to enter text. |
| 7. | Has the fee note been drafted? | Choose an item. | Click or tap here to enter text. |
| 8. | Have you arranged to return records to the clients? | Choose an item. | Click or tap here to enter text. |
| 9. | Does the principal or manager review include written feedback on staff performance? | Choose an item. | Click or tap here to enter text. |
| 10. | Has the principal been notified of any extra services the client might require? | Choose an item. | Click or tap here to enter text. |
| 11. | Has the principal been notified of any specific points emerging from this job which: |  |  |
|  | 1. would benefit other clients of the firm, or
 | Choose an item. | Click or tap here to enter text. |
|  | 1. other partners and staff need to be aware of?
 | Choose an item. | Click or tap here to enter text. |

**Detail below any action required or undertaken in respect of any answers which have notes.**

Click or tap here to enter text.

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| --- | --- |
| Completed by: Click or tap here to enter text. | Date: Click or tap to enter a date. |
| Reviewed by: Click or tap here to enter text.Manager/Partner | Date: Click or tap to enter a date. |

**Detail below any further action required**

Click or tap here to enter text.

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| --- | --- | --- | --- |
| **Action points cleared by:** | Click or tap here to enter text.  |  **Date:** | Click or tap to enter a date. |
| **Partner:** | Click or tap here to enter text.  |  **Date:** | Click or tap to enter a date. |