### Tax return control sheet

|  |  |
| --- | --- |
| Client: Click or tap here to enter text. | File no: Click or tap here to enter text. |

|  |  |
| --- | --- |
| Information request form sent to client | Click or tap to enter a date. |
| Tax return sent to client (even if pre-signed earlier) | Click or tap to enter a date. |
| Tax return approved by client | Click or tap to enter a date. |
| Tax return submitted to HM Revenue & Customs | Click or tap to enter a date. |
| Outstanding tax claims and elections entered in office diary | Click or tap to enter a date. |

**NOTES AND INFORMATION RELEVANT TO THIS RETURN**

**Interest received**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Accountholder* | *Bank/Building Society* | *Account number* | *Datereceived* | *Amount received* | *Paid net orgross* | *Date openedor closed* |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Click or tap to enter a date. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Click or tap to enter a date. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Click or tap to enter a date. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Click or tap to enter a date. |

**Dividends received**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Name ofshareholders* | *Company* | *Number ofshares* | *Datereceived* | *Net amountreceived* | *Date purchased or sold* |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Click or tap to enter a date. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Click or tap to enter a date. |
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| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Click or tap to enter a date. |

Provide details of stock dividends, scrip dividends or overseas dividends overleaf.

If there is insufficient space above, provide details on a separate sheet.

**Pension premiums paid**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Pension company* | *Reference number* | *Datepaid* | *Amountpaid* | *Net orgross* | *PPor RAP* |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Choose an item. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Choose an item. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Choose an item. |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. | Choose an item. | Choose an item. |

**Capital gains**

|  |  |  |
| --- | --- | --- |
| *Descriptionof asset* | *Date of sale or gift* | *Saleproceeds* |
| Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. |
| Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. |

**Other details**

|  |  |
| --- | --- |
|

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| --- |
| Click or tap here to enter text. |

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