### 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**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Account holder* | *Bank/ Building Society* | *Account number* | *Date received* | *Amount received* | *Paid net  or gross* | *Date opened or 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 of shareholders* | *Company* | *Number of shares* | *Date received* | *Net amount received* | *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. |
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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* | *Date paid* | *Amount paid* | *Net or gross* | *PP or 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**

|  |  |  |
| --- | --- | --- |
| *Description of asset* | *Date of sale or gift* | *Sale proceeds* |
| Click or tap here to enter text. | Click or tap to enter a date. | Click or tap here to enter text. |
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| 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**

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