**2024 PERSONAL TAX RETURN DECLARATION**

**COVERING THE PERIOD 06/04/2023 – 05/04/2024**

**NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**INCOME SOURCE Amount received**

1. **Bank or building society interest (ignore ISA’s**) **received £**
2. **P60 or P45 (+P11d if any benefits in kind) Attached / N/A**

We already have these details if we do your company payroll.

1. **Do you have property rental income?**                                                              **Yes / No**

(if yes, then please complete and return the template)

1. **Any other income or capital gains** relevant for your Tax Return?               **Yes / No**
2. **Have you opted for a Marriage Allowance transfer?** **Yes / No**

[www.gov.uk/marriage-allowance](http://www.gov.uk/marriage-allowance)

1. **Do you or your partner receive Child Benefit? Yes / No**

If Yes: -

1. For how many Children
2. How much did you receive for the year to 5/4/2024 **£**
3. Is your income higher than your partners? **Yes / No**
4. **Do you have any other income from worldwide sources?** **Yes / No**

***There are significant UK penalties for non-disclosure of overseas income.***

**EXPENSES TO REPORT                                                                                           Amount paid**

1. **Personal pension contributions** - **net payments made** **£**

e.g. direct contributions you have made or auto enrol deductions from employment.

1. **Charity donations via gift aid – net payments made £**
2. **Working from home (confirm if need to, or choose to)?**  **Yes / No**

**STUDENT LOAN**

1. **Do you have an OUTSTANDING income contingent Student Loan** **Yes / No**

[www.gov.uk/repaying-your-student-loan/which-repayment-plan-you-are-on](http://www.gov.uk/repaying-your-student-loan/which-repayment-plan-you-are-on)

**Plan 1** (began prior to 1/9/2012) or  **Plan 2** (began after to 1/9/2012)

1. **Amount repaid to your student loan account from salary in 2023/24? Plan 1 £**

**Plan 2 £**

**Postgraduate £**