



IMPORTANT NOTICE –
 H M Revenue and Customs are checking into subcontractors
 Tax Returns UK wide. Please provide
 evidence of the expenses you wish to claim, to ensure you
 keep hold of what you are entitled to!



HELP SHEET INFORMATION REQUIRED

NAME: _____

TAX REF No (UTR): _____

DATE OF BIRTH: _____

MOBILE NUMBER: _____

EMAIL ADDRESS: _____

CHARTERED ACCOUNTANTS
 TAX AND BUSINESS ADVISORS

YEAR COVERED: 6 APRIL 2017 TO 5 APRIL 2018

INCOME

1 **HUDSONS INCOME**

We can get details of this direct from Hudsons, although if you have it to hand, please send it in.

2 **NON-HUDSONS INCOME**

Did you receive any other income in the year to 5 April 2018? That was **NOT** through Hudsons? YES / NO

- A) Self Employment Income from Other Contractors (not Hudsons) YES / NO
- B) Did you do any private work and receive any cash amounts for these? YES / NO
- C) Jobseekers Allowance/ Employment and Support Allowance? YES / NO
- D) Employment Income ? YES / NO

In all the above cases please provide appropriate paperwork such as Contractors Statements, P60, P45's, and P11D's.

EXPENDITURE

1 **MOTOR EXPENSES**

Do you run a vehicle for your business? YES / NO

Type VAN / CAR

Registration Plate Number _____

Make/Model _____

Purchase Date _____/_____/_____

Purchase Price £ _____

Insurance £ _____

Repairs / Mot £ _____

Car Tax £ _____

Annual Fuel Cost **PLEASE PROVIDE RECEIPTS/PROOF** £ _____

Estimated Split of Usage: BUSINESS USE _____% PRIVATE USE _____%

Did you buy the vehicle with a loan or on HP? YES / NO

If yes, please provide details of: ● Deposit Paid

● loan amount ● date taken out ● monthly repayment ● loan period

2 SITES

Please list the location/sites you have worked on during the year.

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

3 OTHER TRAVEL EXPENSES

Please provide details of any other travel expenses:

Rail: £ _____
 Bus: £ _____
 Tube: £ _____
 Taxi: £ _____
 Other: £ _____

If 'other' please explain: _____

PLEASE PROVIDE RECEIPTS/PROOF

4 ACCOMMODATION

Did you work away from home and had to stay away overnight?

YES / NO

If yes, how many nights in the year

_____ nights

If you had to pay for any accommodation **out of your own pocket**, please confirm the total cost and provide receipts!

£ _____ total cost

Unfortunately, without proof we cannot include a claim!

Did you pay for evening meals **out of your own pocket**?

YES / NO

Did you receive a nightly allowance from your contractor?

YES / NO

5 TELEPHONE

Please provide details of your mobile phone bill

please indicate: **Weekly/Monthly/Yearly:** £ _____

6 MATERIALS BOUGHT FOR THE JOB

Please list / provide a total of all material purchases in the year

£ _____

PLEASE PROVIDE RECEIPTS/PROOF

7 TOOLS/EQUIPMENT

Please list / provide a total of all tools and equipment purchases.

For any purchase over £100 please provide details of what it was

£ _____

PLEASE PROVIDE RECEIPTS/PROOF

8 PROTECTIVE CLOTHES / SAFETY CLOTHING

Please list all protective / safety work clothes for the year

Protective/safety clothing include, gloves, hard hats, protective boots, high vis clothing.

The costs of jeans, jumper, t shirts or thermal gloves are **NOT** an allowable expense!

£ _____

PLEASE PROVIDE RECEIPTS/PROOF

9 **OTHER EXPENSES**

Typically these may include: BUSINESS INSURANCE, POSTAGE&STATIONARY, SUBSCRIPTIONS, TRAINING COSTS, BUSINESS ACCOUNT BANK CHARGES, BUSINESS OVERDRAFT/LOAN INTEREST, LEGAL FEES, ROAD TOLLS, etc
Please provide details of expenses below and totals for the year

_____	£ _____
_____	£ _____
_____	£ _____

PLEASE NOTE: ONLY INCLUDE EXPENSES WHICH YOU HAVE PAID FOR YOURSELF.
YOU CANNOT CLAIM A DEDUCTION FOR EXPENSES PAID FOR BY THE CONTRACTOR.

OTHER INFORMATION

If the following apply please provide details below

1 **ANY OTHER TAXABLE INCOME FOR THE YEAR**

For example: pensions, property income, savings interest, dividends

_____	£ _____
_____	£ _____
_____	£ _____
_____	£ _____

2 **PENSION CONTRIBUTIONS MADE BY YOU**

Please provide details of any pension contributions for the year.

£ _____

3 **MARRIED COUPLES ALLOWANCE**

Are you Married?

YES / NO

If YES, how much is your wife's annual income ?

£ _____

4 **ANYTHING ELSE**

Please let us know about anything else which you think may be relevant to your Tax Return on the back of this form!



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34 FALS GRAVE ROAD • SCARBOROUGH • NORTH YORKSHIRE • YO12 5AT • (T) 01723 361039
info@lloydowson.co.uk • www.lloydowson.co.uk

Trading name of Lloyd Dowson Limited. Registered in England. No. 3114610

ANYTHING ELSE:

Please let us know below about anything else which you think may be relevant to your Tax Return?

IMPORTANT:

I declare that the information I have given on this help sheet is correct and complete to the best of my knowledge and belief, and I can provide documentary evidence should H M Revenue and Customs wish to enquire into my Tax Return at a future date.

Signed _____ Date _____



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Trading name of Lloyd Dowson Limited. Registered in England. No. 3114610

Regulated by the Institute of Chartered Accountants in England and Wales for a range of investment business activities. Registered Auditors – 9043573 **FORM 1**



TAX REFUND



If you have requested our fee to be taken out of any refund due please complete which repayment method you prefer by completing the following:

Repayment by Cheque:

Or

Repayment direct to bank A/c:

(in this case please complete the details below)

Name on A/c: _____

Bank Name : _____

A/c Number : _____

Sort Code : _____

The procedure to take your fees is confirmed.

Signed _____ Dated _____

Please be aware we shall call you prior to sending any repayment direct to the above bank account.