



MEDINA HOUSE
NO 2 STATION AVENUE
BRIDLINGTON
EAST RIDING OF YORKSHIRE
YO16 4LZ

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www.lloyddowson.co.uk

FULL NAME:

ADDRESS:

TELEPHONE - MOBILE:

TELEPHONE - OTHER:

EMAIL ADDRESS:

DATE OF BIRTH:

DATE SELF EMPLOYMENT STARTED:

TAX REFERENCE NUMBER (UTR):

NATIONAL INSURANCE NUMBER:

SEND THIS INFORMATION FREEPOST TO:

FREEPOST NEA855
LLOYD DOWSON – CIS EXPERTS
MEDINA HOUSE
2 STATION AVENUE
BRIDLINGTON
EAST YORKSHIRE
YO16 4BR

HELP SHEET – WHAT WE NEED

YEAR COVERED: 6 APRIL 2010 TO 5 APRIL 2011

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 earnings that were NOT through Hudsons **YES / NO**
during the year to 5 April 2011

If yes, and this work was self employed please send us the payment statements / details

If yes, and this work was on PAYE please send us your P45 or P60 form for that employment

EXPENDITURE

1 MOTOR EXPENSES

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

Type **VAN / CAR**

If Car, Number Plate _____

Purchase Date _____ / _____ / _____

Purchase Price £ _____

Insurance £ _____

Repairs / Mot £ _____

Car Tax £ _____

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

Estimated Split of Business Use / Private Use **BUSINESS USE** _____ %

PRIVATE USE _____ %

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

If yes, please provide details of:

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

Do you use a second vehicle for business? **YES / NO**

If yes, please indicate business miles driven in this vehicle for the year _____ miles

2 OTHER TRAVEL EXPENSES

Please provide details of any other travel expenses:

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

Was this: Rail / Tube / Bus / Taxi / Other :

3 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 indicate the average cost per night

£ _____ per night

4 TELEPHONE

Please provide details of your mobile phone bill

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

Estimated Split of Business Use / Private Use

BUSINESS USE _____ %

PRIVATE USE _____ %

If you also use your landline for business please provide an estimate of the cost of **business calls** for the year

£ _____

5 MATERIALS BOUGHT FOR THE JOB

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

£ _____

6 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

£ _____

7 WORK CLOTHES / SAFETY CLOTHING

Please list / provide a total for all work clothes / boots / etc for the year

£ _____

8 USE OF HOME AS OFFICE/STORE

Do you run your business / keep your books at home

YES / NO

Do you use your garage or yard as a store for materials

YES / NO

If yes, we will calculate the correct allowance.

9 WIFE'S WAGES

Does your wife help with your work –

Paperwork / Bookkeeping / Driving / Phone Calls etc?

YES / NO

Did she have her other taxable earnings in the year ended 5 April 2011?

YES / NO

If yes, did these earnings exceed the tax free allowance, of £6,475?

YES / NO

10 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 **ANYTHING ELSE**

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

IF YOU SIMPLY WANT TO CHUCK EVERYTHING IN A CARRIER BAG AND SEND IT IN – YOU CAN DO SO, BUT PLEASE BE AWARE IT WILL COST MORE FOR US TO PROCESS FOR YOU.

