



Russell & Co.

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12th April 2013

Dear Paul,

Tax Return - Year ended 5 April 2013

We have pleasure in enclosing your Income Tax Checklist for the year.

We also enclose a brief set of instructions that will help you provide us with the necessary details to complete your Return.

Please complete the form as fully as possible before returning it to us with all supporting documents, tax certificates, dividend vouchers, P60's / P45's etc. Please also check the personal information detailed on the form and notify us of any changes.

If you have any queries or need any help completing the form, please do not hesitate to contact us.

Yours sincerely

Russell & Co



**THE INSTITUTE
OF CHARTERED
ACCOUNTANTS**

IN ENGLAND AND WALES

INCOME TAX CHECKLIST 2013

INSTRUCTIONS

Address and contact details :

The information contained on the attached checklist shows what we are currently holding on our records. In many cases, we note clients have not previously given us their **telephone numbers, dates of birth and National Insurance numbers**. If these sections towards the top right hand side of the first page are missing or incorrect, then would you be kind enough to update these details as it will assist the completion of your tax return form and future contact. Additionally, would you please write under the address your current **email address** so that we can register you on our website. This will enable you to receive information from us by email on a regular basis, as well as offering you additional pages to be viewed from our site as a registered member. There are no costs in this regard.

Income and self employment :

Throughout the income tax checklist, the areas that are shaded in grey, are showing you information relating to your income for the previous year. The spaces towards the right hand side of the shaded areas are for you to enter current information for the 12 months ended 5 April 2013. This information could be change of business details, additional income types, as well as the new 12 month calculations for bank and building society interest, dividends, etc.

Shareholdings :

Please could you provide us with details of all shares held as at 5 April 2013, including the name of the company, the number of shares held and the original date that they were purchased. If any shares have been acquired, issued or disposed of during the period, please could you also notify us of the dates of any transactions, the number of shares involved, and the cost and proceeds of these transactions. It would be appreciated if you could provide us with as much of this information as possible, as our systems now link with the stock exchange and we will be able to input significant details on your behalf, even if you do not provide us with the dividend voucher documentation.

Pension contributions :

For clients who make a personal pension contribution it is vitally important to advise us of the contributions that you have made and to which provider(s), during the 12 months ending 5 April 2013. This is important to make sure that you obtain full tax allowances.

Additional information :

Please use the 'additional information' section to provide us with details of any other income, reliefs, allowances or capital gains that you feel may be relevant to the tax return form. These may include the following details -

- Any charitable donations made in the year
- New rental properties acquired
- Any properties sold, including your primary residence
- Do you receive child benefit

Please remember that this documentation is for internal use only, and therefore you may use it to provide us with as many written notes as you feel are necessary, to assist us in the preparation of your return. If you have any queries or difficulties, please do not hesitate to contact us.