Beginning 2 End

Tel: 0845 057 3486
E-Mail: selfassessment@b2e-online.co.uk

For the tax year ending	5th April	Insert Year

Please complete in BLOCK CAPITALS and tick where necessary

A Personal details

Title (Mr/Mrs/Miss/Ms/Other)		Marital Status	
Surname			
First Name(s)			
Full Address	Postcode		
Telephone No's.			
E-mail address			

Date of Birth

d	d	m	m	y	y

National Insurance Number

Letters		Numbers						Letter

Name of Spouse

Spouse's date of birth

d	d	m	m	y	y

Date of marriage

d	d	m	m	y	y

B Tax Office Details

Tax office address

IF YOU HAVE RECEIVED A TAX RETURN PLEASE SEND IT WITH THIS QUESTIONNAIRE.
We only need the tax Return - DO NOT send any other Revenue booklets etc.

Ten Digit Tax office reference - this is shown as the UTR on top of the Tax Return.

This will be a ten digit number.

Please note the following:

1 If you have had more than one job during the year, please ensure that you supply a P45/P60 for the other jobs.
2 If you have dividends, please ensure the dividend vouchers are included for payments received during the year.
3 Remember to advise us if you have had your tax code changed to pay underpaid tax.

Questionaire

Please provide us with answers to the questions below. This information is required for us to accurately complete your return.

C Income from Employment(s)

1. Did you receive any income from employment for the tax year ending 5 April?

YES ☐ please go to Q2

NO ☐ please go to Section D

Please indicate any directorships and whether the company is classed as a 'close' company. (A private limited company with 5 directors or less.)

2. Please provide the following for each different employment during the year.

P60 / P45 - summary of earnings and tax paid. please tick & enclose ☐

P11d - summary of expenses and benefits in kind please tick & enclose ☐

Your P60 will show total pay and tax. For each employment held at 5th April, your employer is required to provide you with a P60 by 31st May. If you changed employment during the year you should have part 1A of the P45 given to you by your previous employer.

Your P11D indicates benefits and expenses provided/paid to you by your employer. Your employer is required to provide you with a copy of the P11D(or a substitute statement) by 6th July after the end of the tax year.

3. Expenses incurred in doing your job.

Unless otherwise advised, we will assume that all expenses declared on the P11d were incurred for the purposes of doing your job. Please advise if this is not the case.

If you incurred any professional subscriptions in doing your job, please provide a description and the total amount incurred under additional information, section J.

D Income from Pensions and/or Social Security Benefits

1. Did you receive any income from Pensions/Social Security Benefits for the tax year ending 5th April?

YES ☐ please go to Q2

NO ☐ please go to Section E

2. Please provide full details of all income from pensions and social security benefits. You should receive an annual statement clearly showing the income you have had.

If you have received Job Seekers Allowance (JSA) you should have received a P45/P60 for the period.

E Interest income from bank and other savings accounts

1. Did you receive any interest from bank/savings accounts for the tax year ending 5th April?

YES ☐ please go to Q2

NO ☐ please go to Section F

2. For all accounts please provide the interest certificate(s)/statements that clearly show the amount of interest received.

Remember to include interest that you may have received on unit trust investments etc.

F Income from investments - Dividends from Companies/Unit Trusts

1. Did you receive any dividends from UK investments for the tax year ending 5th April?

YES ☐ please go to Q2

NO ☐ please go to Section G

For all investments please provide the dividend certificate(s) clearly showing the amount of dividends received in the tax year.

G Other Income

1. Did you receive any other income for the the tax year ending 5th April?

YES ☐ please go to Q2

NO ☐ please go to Section H

Please provide full details if you received any other income for the tax year ending 5th April.

H Pension Contributions

1. Did you make any pension contributions in the tax year ending 5th April?

YES ☐ please go to Q2

Do not include contributions deducted from your pay by your employer, as tax relief is given via your salary.

NO ☐ please go to Section I

2. Please enclose contribution certificates or other evidence of premiums paid in the year.

I Tax Details

Please supply your last Inland Revenue Tax calculation — Enclosed ☐ Not applicable ☐

Please supply copies of PAYE coding notice's — Enclosed ☐ Not applicable ☐

J Additional Information

Please use the space below to supply additional information as required.

Additional Information

Conclusion

Make sure that you have enclosed a cheque made out to Beginning 2 End Ltd as follows:

Self assessment personal tax return (B2E Limited Company clients) - £75

Self assessment personal tax return - £110

Self employed personal tax return - £150

Property rental personal tax return - £150

(All prices above include VAT)

If you would prefer to pay online , you may do so. Please contact us for our account details.

Once you have completed this Tax Return form, please send it and all other relevant information to us together with this signed application to:

Beginning 2 End Limited, 70 Upper Richmond Road, Putney, London, SW15 2RP

I accept the terms and conditions of Beginning 2 End Limited

Signed		Date	

Beginning 2 End

Tel: 0845 057 3486
E-Mail: selfassessment@b2e-online.co.uk

Self Assessment contract

The engagement terms set out the basis upon which we will complete your Self Assessment Tax Return. You are legally responsible for making a correct return in respect of your annual tax liability and for payment of your tax on time. It is essential that we as your agent are supplied with all the relevant information.

1. We will prepare your personal tax return together with all relevant supplementary pages. You are responsible for providing all the information and data that we require for this purpose. To avoid interest, penalties and/or surcharges, you need to provide all this information and documentation on time, for the return to be submitted by the due date. Time in this instance refers to any time/date as specified by B2E in any letter/email or other written correspondence. This covers not only:
(a) any changes in previously reported categories and information, but also
(b) any new sources of income and/or gain whether taxable or taxed at source. Provided that all information and documentation, including where appropriate Notice of Coding (P2), P60, P45, car mileage benefit and benefits in kind (P11D) etc. is received before any deadlines that will be conveyed to you, we undertake to prepare for signature this statutory document.

2. We will forward your tax return form and supplementary pages for your approval and signature within 28 days of having received all the required information. At this point you are responsible for sending the return directly to the Inland Revenue.

3. We will also tell you how much tax to pay, make recommendations about payments on account and inform you of dates for payment. Our computation will show:
(a) the payments on account, due on the 31st January/31st July after the end of the relevant tax year
(b) the final instalment (or refund) due by the following 31 January. Please note - no further reminder will be sent by us, following notification of the final installment/refund, although the Inland Revenue will issue direct to taxpayers a statement of account.

4. If we ask you for information to complete the tax return and it is not provided within the timescale requested, resulting in the preparation and submission of the return being delayed, we accept no responsibility for any penalty or interest that may arise. Under the self-assessment scheme, there are a number of key dates by which returns and payments must be made. Failure to meet these deadlines results in automatic penalties and interest. You are responsible for ensuring that payments of tax are made on time and submitting your tax return. Not only has the return to be submitted by the due date, but payments on account and the final instalment must be paid by the dates shown above. An automatic penalty of £100 will arise, with additional penalties thereafter for non/late submission of the return. Interest arises on unpaid tax from the date when due. Surcharges based on 5% of tax unpaid after 28 days from final instalment date arise automatically.

5. The service we provide is aimed at completing your tax return accurately and submitting this back to you. It does not involve checking the Inland Revenue's calculations. We do not aim to advise you on how best to avoid tax, but will try to ensure that you obtain all allowances and relief that you are entitled to.

6. As the signed return, together with any supporting information that we consider appropriate, will constitute a taxpayers full disclosure, we reserve the right to have written confirmation on any particular aspect effecting the content. In the event of an enquiry or investigation being initiated by Inland Revenue, we undertake to involve the client at the outset, to ensure clarity of communication to Inland Revenue.

7. Our fees are charged as follows:
Self assessment personal tax return (B2E Limited Company clients) - £75; Self assessment personal tax return £110, Self employed personal tax return £150, Property rental personal tax return £150.
We reserve the right to refuse to undertake the work, or to quote an increased fee, if we decide your affairs are particularly complex. Should we refuse to undertake the work, you will be refunded in full, and your cheque or cash will be returned to you. The fee is payable upfront by cheque to ‘Beginning 2 End Ltd’. Please send your cheque back to us, together with this agreement, should you agree with all the above terms. Alternatively you may deposit cash or a cheque into the Beginning 2 End bank account. Please contact us for our account details.

HM Revenue & Customs

Authorising your agent

Please read the notes on the back before completing this authority. This authority allows us to exchange and disclose information about you with your agent and to deal with them on matters within the responsibility of HM Revenue & Customs (HMRC), as specified on this form. This overrides any earlier authority given to HMRC. We will hold this authority until you tell us that the details have changed.

I, *(print your name)*

of *(name of your business, company or trust if applicable)*

authorise HMRC to disclose information to

(agent's business name)

who is acting on my/our behalf. This authorisation is limited to the matters shown on the right-hand side of this form.

Signature *see note 1 before signing*

Date

Give **your personal** details or Company registered office here

Address

Postcode

Telephone number

Give **your agent's** details here

Address

Postcode

Telephone number

Agent codes (SA/CT/PAYE)

Client reference

For official use only

SA	☐	/ /	COTAX	☐	/ /
NIRS	☐	/ /	EBS	☐	/ /
COP	☐	/ /	VAT	☐	/ /
NTC	☐	/ /	COP link	☐	/ /

Please tick the box(es) and provide the reference(s) requested *only* for those matters for which you want HMRC to deal with your agent.

Individual*/Partnership*/Trust* Tax Affairs ☐
**delete as appropriate* (including National Insurance).

Your National Insurance number *(individuals only)*

If you are self employed tick here ☐

Unique Taxpayer Reference *(if applicable)*

If UTR not yet issued tick here ☐

If you are a Self Assessment taxpayer, we will send your Statement of Account to you, but if you would like us to send it to your agent instead, please tick here ☐

Tax Credits ☐

Your National Insurance number *(only if not entered above)*

If you have a joint Tax Credit claim and the other claimant wants HMRC to deal with this agent, they should sign here

Name

Signature

Joint claimant's National Insurance number

Corporation Tax ☐

Company Registration number

Company's Unique Taxpayer Reference

Employer PAYE Scheme ☐

Employer PAYE reference

Accounts Office reference

VAT ☐ *(see notes 2 and 5 overleaf)*

VAT registration number

If not yet registered tick here ☐

1 Who should sign the form

If the authority is for	Who signs the form
You	You. We need the name of the business in all cases unless this form is for your personal tax affairs
Partnership	The partner responsible for the partnership's tax affairs. It applies only to the partnership. Individual partners need to sign a separate authority for their own affairs
Trust	One or more of the trustees
Company	The secretary or other responsible officer of the company

2 What this authority means

- **For matters other than VAT or Tax Credits**

  We will start sending letters and forms to your agent and give them access to your account information online. Sometimes we need to correspond with you as well as, or instead of, your agent.

  For example, the latest information on what SA forms we send automatically can be found on our website, go to **www.hmrc.gov.uk/sa/agentlist.htm** or phone the SA Helpdesk on **0845 9 000 444**.
  You will not receive your Self Assessment Statements of Account if you authorise your agent to receive them instead, but paying any amount due is your responsibility.

  We do not send National Insurance statements and requests for payment to your agent unless you have asked us if you can defer payment.

  Companies do not receive Statements of Account.

- **For VAT and Tax Credits**

  We will continue to send correspondence to you rather than to your agent but we can deal with your agent in writing or by phone on specific matters. If your agent is able to submit VAT returns online on your behalf, you will need to authorise them to do so through our website. For joint Tax Credit claims, we need both claimants to sign this authority to enable HM Revenue & Customs to deal with your agent.

3 How we use your information

HM Revenue & Customs is a Data Controller under the Data Protection Act 1998. We hold information for the purposes specified in our notification to the Information Commissioner, including the assessment and collection of tax and duties, the payment of benefits and the prevention and detection of crime, and may use this information for any of them. We may get information about you from others, or we may give information to them. If we do, it will only be as the law permits.

We may check information we receive about you with what is already in our records. This can include information provided by you, as well as by others, such as other government departments or agencies and overseas tax and customs authorities. We will not give information to anyone outside HM Revenue & Customs unless the law permits us to do so.

This authority does not allow your agent to request personal information held about you under the subject access provisions of the Data Protection Act 1998.

Further information can be found on our website, **www.hmrc.gov.uk**

4 Multiple agents

If you have more than one agent (for example, one acting for the PAYE scheme and another for Corporation Tax), please sign one of these forms for each.

5 Where to send this form

When you have completed this form please send it to:
HM Revenue & Customs, CAA Team, Longbenton, Newcastle upon Tyne, NE98 1ZZ.
There are some exceptions to this to help speed the handling of your details in certain circumstances.
If this form:

- accompanies other correspondence, send it to the appropriate HM Revenue & Customs (HMRC) office
- is solely for Corporation Tax affairs, send it to the HMRC office that deals with the company
- is for a Complex Personal Return or Expatriate customer, send it to the appropriate CPR team or Expat team
- accompanies a VAT Registration application, send it to the appropriate VAT Registration Unit
- has been specifically requested by an HMRC office, send it back to that office.