

TAX INFORMATION CHECKLIST

We have prepared a checklist as a guide to what would normally be required to complete the Annual Tax Return (Form 11). Please forward to us the relevant documentation and information that applies from the list at your earliest convenience.

BUSINESS

- Books & Records for your accounting year-end. You may have these on computer, if so please contact us to ensure we can open the files.
- Bank Statements for your business.
- Details of any loans, leases or rent agreements.
- Forms P60 in respect of yourself or your spouse for the tax year ended, if either of you were working in the year.
- Details of any other income, including pension income.
- Details of any Payments made against income tax or Preliminary tax during the year.



PERSONAL

- Mortgage interest certificate for the year (state if the current mortgage is your first and when did it start) if credit is not claimed at source.
- Details of any medical expenses being claimed including receipts.
- Details of Permanent Health Insurance
- Pension details (R.A.C cert.) if any
- Details of family and marital status. (Incl. any change in marital status or new children if applicable). Details of all children under the age of 16 (Incl. Names and DoB. & School)

Help preparing your Return

Contact us at www.mytax.ie for best rates and years of experience in dealing with Irish businesses.

Important Dates

Under the Self Assessment system taxpayers are obliged to:

1. Pay Preliminary Tax on or before the 31st of October each year.
2. Make their Tax Return not later than the 31st of October following the end of the Tax Year.
3. Pay any balance of tax due by 31st October following the end of the tax year.

Self-Assessment also applies to Capital Gains