

ANDREW CROSS & CO.

Chartered Accountants established since 1969

Plaza Building, 102 Lee High Road, London SE13 5PT

Tel : 020 8318 9909 Fax: 020 8318 9913 www.andrew-cross.com info@andrew-cross.com

There are four pages to this document including this one, containing:

Key Dates (tax deadlines)

Your Information Request

Terms and Conditions

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PERSONAL TAX DEADLINES FOR THE 2007 TAX YEAR

The first deadline is 30 September 2007

This is for taxpayers who want the tax office to confirm their tax calculation and the payment arrangements for any tax.

If you are employed and send in your Tax Return before this deadline, you may be able to pay your tax in installments starting from April 2008 rather than in one lump sum on 31 January 2008.

If you are self employed and sending your Tax Return before this deadline, then the Inland Revenue will confirm the actual amounts you need to pay and send you a payslip before the due date.

The final deadline is 31 January 2008

If you miss this deadline, you may be fined £100.

The Inland Revenue will not tell you the tax payments required and it will be your responsibility to make any payment. We will calculate your tax from your Tax Return and advise you what to pay, but it will be your responsibility to make any such payment.

REMEMBER — SENDING IN YOUR TAX RETURN SOONER RATHER THAN LATER WILL NOT MEAN YOU HAVE TO PAY YOUR TAX ANY EARLIER

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INFORMATION REQUEST

PERSONAL DETAILS: (please print details)

Full name _____

National Insurance Number _____ Date of birth _____

Marital status (delete as applicable) Single/Married/Separated/Divorced/Widowed/Civil Partnership

If married, partner's full name and date of birth _____

In order for us to comply with our statutory obligations, would you please supply us with a **copy** of the following:

Current valid passport (photo page only) or new style photographic driving license

AND

Proof of address, such as utility or council tax bill, or current bank statement.

PLEASE SEND US INFORMATION FOR THE YEAR ENDED 5TH APRIL 2007

INCOME

	Information required
Employment <input type="checkbox"/>	P.60 from your employer
Benefits in kind (e.g. car, health insurance etc.) <input type="checkbox"/>	P.11D from your employer
Self employment <input type="checkbox"/>	Details of income/expenses
Pension income (state and private) <input type="checkbox"/>	Pension P.60
Social security benefits <input type="checkbox"/>	Statements from the DSS
Property income <input type="checkbox"/>	Type of letting, property address, income and expenditure details,
property mortgage details	
Bank/Building Society interest <input type="checkbox"/>	Details of interest received
Dividends <input type="checkbox"/>	Dividend vouchers
Any other income <input type="checkbox"/>	Please provide full details

ALLOWANCES

Pension contributions <input type="checkbox"/>	Name of provider, contract number, amount paid
Retirement annuity payments <input type="checkbox"/>	Name of provider, contract number, amount paid
Charitable covenants/gift aid <input type="checkbox"/>	Names and amounts paid in the year

Please note that the above list is not an exhaustive list, and by necessity, covers mainly common sources of income and expenditure. If in doubt, please contact us and we will be pleased to assist.

PLEASE DO NOT SEND US YOUR TAX RETURN FORM

WHAT IS THE NAME OF YOUR TAX OFFICE? _____

WHAT IS YOUR TAX REFERENCE NUMBER? _____

This information can be found on the front of your Tax Return

WHEN COMPLETE PLEASE RETURN TO ANDREW CROSS & CO (see address above)
TOGETHER WITH YOUR DOCUMENTATION

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Terms and conditions 2006/07 tax year

1. We will prepare your Tax Return from information provided and calculate your tax for that tax year from that information. This will not include any adjustment from earlier tax years. If you return the tax form to us as we ask, we will ensure that the tax office receives this form safely.
2. You should allow us at least 10 working days to process your Return. However, we will usually process your Tax Return within seven working days. During peak periods, this can take longer. We will be able to process your Return in time for the 31 January 2008 deadline if we receive ALL your papers by 15 January 2008. After this date, we may be able to process the Return but we cannot guarantee that you will be able to comply with the deadline; no Return will be processed without a deposit cheque.
3. If this is the first year we have prepared your Return, the law requires us to hold proof of your identity and we regret we will be unable to proceed without this information. There is more detail on the information listing.
4. You will be issued with an invoice when the Tax Return is completed, and our terms of payment are such that we request payment by return. We reserve the right to charge interest on amounts which remain outstanding after 30 days.
5. If we are required to amend your Tax Return due to circumstances beyond our control, we reserve the right to levy an additional administration charge of £35 + VAT.
6. You can send us copies or original documents. When sending photocopies, please make sure that the numbers are clearly visible.
7. If your paperwork can be fitted into an envelope A4 in size and weighing less than 150g we will post documents back to you once your account with us is paid in full. If your paperwork is heavier than this, we will ask that you make arrangements for collection or pay the excess postage in advance of the papers being returned to you. We will offer this option and make the appropriate charge when invoicing you for work carried out. If you wish to collect your papers, we reserve the right to make a charge if you have not collected your paperwork within six months of the work being finalised.
8. If the tax office raises questions concerning your Tax Return and you wish us to deal with those questions, we will raise an additional charge which will be based on the nature and complexity of the enquiry. Typically a fee to deal with a basic information request will start from £45 + VAT.