



INCOME TAX CHECKLIST 2020

PERSONAL DETAILS:

Full Name:

Address:

PPS Number:

Date of Birth:

Resident Details:

Please tick if you spent less than 183 days in Ireland in 2020

Self

Spouse

Please tick if you spent less than 280 days in current + preceding tax year

(Please note that if you are non-resident your foreign income will be required in order to claim a portion of the Tax Free Allowances)

Nationality

Domicile

(To find more information on 'What is Domicile?' please follow the below link)

<https://www.revenue.ie/en/jobs-and-pensions/tax-residence/what-is-domicile.aspx>

Medical Card Holder Y N

MARITAL STATUS (please tick):

Single Single Parent Widowed Separated

Married Divorced Civil Partnership

Date of marriage:

If divorced/Separated in 2020, date of Divorce/Separation: __/__/2018

If widowed in 2020, date of spouse's death: __/__/2018

ASSESSMENT TYPE (please tick):

Single Joint Separate

SPOUSES DETAILS:

Name:

PPS Number: Date of Birth:

Gender:



INCOME TAX CHECKLIST 2020

Please tick the relevant box below

TAX CREDITS & RELIEFS

- Single Person Child carers Credit *
- Home Carer Tax Credit*
- Incapacitated Child Tax Credit*
- Widowed Person/Surviving Partner with qualifying child(ren)
- Dependent Relative Tax Credit*
- College Fees Tax Credit*
- Home Renovation Incentive Tax credit*
- Income Protection Policies*
- Medical insurance tax credit

*(Please note that you will only be entitled to this credit if the premiums were paid by your employer on your behalf as a benefit in kind)**

Medical Expenses: *

Other Credits/Reliefs – Please give details:

CHARGES AND DEDUCTIONS

Pension Scheme Contributions:*

Retirement Annuities:*



INCOME TAX CHECKLIST 2020

INCOME

Social Welfare Income: Type Amount:

(please provide a summary of payments from your social welfare provider)

Income from Deposits:

(Please supply interest certificates)*

Share Dividends:*

Income from Rental property*

Income from Self Employment/Sole Trader income*

Overseas Income:

Chargeable gains subject to CGT

Other Income – please give details:

P45/P60's are required for all Income earned as a director or PAYE employee for you and your spouse (if jointly assessed) |

If you have previously requested a Form P21 Balancing Statement or received any tax refunds in relation to 2020 please forward all details.

Please note that if your LPT records are not up to date with the Revenue Commissioners, a surcharge may be applied to your Income Tax Return for 2020 .

WE PROVIDE IRISH TAX & BUSINESS SERVICE



Business Setup



Get your Tax Refund



Irish Tax Services