

Mr James Dunstan
99 Duckpool Road
Newport
Gwent
NP19 7EP

8 January 2014

Dear James

2013 Self Assessment Tax Return

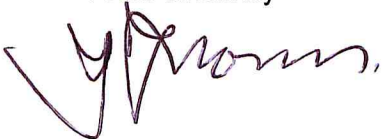
I would like to commence work on your self assessment tax return for the year ended 5 April 2013 and would therefore be grateful if you could let me have the following:-

1. Copies of forms P45 and/or P60 in respect of any employments held during the year. If these forms are not available, please let me have copies of the final payslip(s).
2. If you have copies of any PAYE coding notices for last year or the current year, please forward them to me.
3. If you received any benefits in kind from employment, such as a company car, mileage allowance, private medical insurance, or any other expenses paid on your behalf, please let me have a copy of the form P11D.
4. Full details of all income received and expenses incurred in connection with your self-employment, with supporting receipts and a note of the business miles travelled during the year. I will also require copies of all bank and credit card statements, including those for the month after the year end in case some payments cleared during the current year.
5. The amount of state pension received during the year, together with a note of the new weekly rate for the current year.
6. Please let me have full details of any state benefits received.
7. Forms P60 from your pension providers.
8. If you made withdrawals from any life assurance policies during the year, I will need full details of the policy together with a copy of the chargeable event certificate if applicable.
9. Details of all bank, building society and National Savings accounts held both by yourself and any in joint names with someone else, together with the interest credited during the year to 5 April. Please advise me if any accounts have interest credited gross and also please let me know the relevant dates on which any accounts have been opened or closed.
10. If you hold any shares or unit trusts, please let me have full details, including the number of shares/units held, together with copies of any interest or dividend vouchers received. If any shares or units were purchased or disposed of during the year, please let me have copies of the relevant contract notes.
11. The amount of rents due to be received, together with a note of any amounts currently outstanding and details of all expenses incurred during the year, including a certificate of loan interest paid from the mortgage provider.
12. If you made any pension contributions, please let me know the net amount paid, together with a note of the pension provider and policy number.
13. If any charitable donations were made, please let me know the net amount paid and the full name of the charity.

Finally, if you received any other income during the year, or if any assets were disposed of, please let me have full details.

If you would like to discuss any of the above, or if you experience any difficulty in collating the information, please do not hesitate to contact me.

Yours sincerely

A handwritten signature in dark ink, appearing to read 'John Thomas', written in a cursive style.

John Thomas FCCA
TaxAssist Accountants