



Tax Return Filing Top Tips

Use the checklist overleaf to gather your paperwork so you can get your tax return done early. You'll be able to spread any over or underpayments from the previous year across more months.

- 1 Claiming allowances** - To claim the married allowance, confirm you're married or in a civil partnership and not separated. If you have dependent children and you claim child allowance, enter each child's details including their social security number. Tick the box under children's allowances if you're a single parent and want to claim the additional personal allowance.
- 2 Use the right figure from your payslip** - On your end of year final payslip, use the amount described 'Gross taxable pay to date'. If your payslips don't show this, your employer should give you a summary confirming your year-end or final pay.
- 3 Employment expenses** - Keep receipts, and check it is an allowable expense: gov.je/TaxExpenses
- 4 Enter any payments you make into qualifying pension schemes in the right section** - There is one section for payments you make into an employer's pension scheme, and a separate section if it's a Jersey private pension scheme.
- 5 Jersey Social Security Pension** - Social Security send out pension statements towards the end of January for the Jersey Social Security pension. If your wife receives a pension by virtue of your contributions, declare it as your income, unless you have already moved to independent taxation.
- 6 UK State Pension income** - If you get a UK state pension the statement will be for a UK financial year. Work out the amount for the calendar year and enter that.
- 7 Check you've included all your income** - Bar tips, second jobs, benefits in kind, weekend jobs, part-time businesses, interest in all your bank accounts must be declared.
- 8 Take your time and double check** - If you declare different figures to those we get from banks and employers, it may delay your assessment. Read carefully and double check the figures you've entered against the figures on your paperwork.



TAX RETURNS

> PAPER DEADLINE	31 MAY
> ONLINE DEADLINE	31 JULY



Tax return paperwork checklist

I need

I have

☐☐

End of year final payslip

☐☐

Employer benefit in kind statement

☐☐

Tips or casual work income totals

☐☐

Tax-deductible expenses record

☐☐

Social Security pension statement

☐☐

Other pension advice letters

☐☐

Mortgage interest certificate

☐☐

Children's social security numbers

☐☐

Bank statements

☐☐

Dividend certificates

☐☐

Lodger income totals

☐☐

Self-employment business records

☐☐

Property income records

☐☐

Other

☐☐

Other

TO DO DATE:

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Remember, we don't need the paperwork with the return, but you should keep it safe in case we ask for it.

SMART
PHONE
NOT
REQUIRED

It's now easier to file online. Why not try it?
www.gov.je/MyTaxReturn