

Client Information Checklist – Sat Tax Limited

Cryptoasset Records

All exchanges used (API connected or files uploaded)	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
All wallets provided	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Balances Captured	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Transfers between own wallets captured	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Historic data check	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Employment Income

P60	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
P45 (if applicable)	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
P11D	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Self-Employment

Business records	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Accounting software access / spreadsheets	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Property Income

Rental income totals	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Expense breakdown	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Mortgage interest statements	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Property sale details (if applicable)	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Savings and Investments

Bank interest summaries	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Dividend vouchers	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Pension Income

State Pension details	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Private pension P60s	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Other Income & Gains

Share disposals	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Foreign income	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Other income	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Reliefs & Claims

Pension contributions	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
SEIS/EIS certificates	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Gift Aid donations	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Job Expenses

Milage	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Uniform allowance	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Professional Subscriptions	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Other Information

Tax code notice	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Child Benefit details	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Marriage Allowance details	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided

Changes During the Year

Address changes	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Marital status changes	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided
Dependents changes	<input type="checkbox"/> Relevant	<input type="checkbox"/> Provided