

TAX RETURN FORM

TAX YEAR

Fill in this form and return it to us with your receipts.
 Email - info@mcmahonandco.ie OR
 Post - McMahon & Co, 9-10 Academy Court, Academy Street, Kildare Town, Co. Kildare

N.B: Please make sure all attachments are included e.g., Statements etc

PERSONAL DETAILS

Name:

Address:

Email:

Date of Birth:

Job Description:

Nationality: **PPS No**

Martial Status:	Single	<input type="text"/>	Married	<input type="text"/>	Widowed	<input type="text"/>
	Divorced	<input type="text"/>	Partner	<input type="text"/>	Separated	<input type="text"/>

If relevant:

Date of Marriage:

Date of Divorce/Separation:

Date of Spouse Death:

	YES	NO
Do you have any children under 18 or in full-time education?	<input type="text"/>	<input type="text"/>

If yes, please confirm the below for youngest child:

Date of Birth:

PPS:

Spouse Details (if Applicable)

Full Name:

Date of Birth:

Nationality: **PPS No**

Job Description:	Employed	<input type="text"/>	Company Director	<input type="text"/>
	Self Employed	<input type="text"/>	Farmer	<input type="text"/>

Residency Details:

	<u>Self</u> (Y / N)	<u>Spouse</u> (Y / N)
Resident	<input type="text"/>	<input type="text"/>
ORD Resident	<input type="text"/>	<input type="text"/>
Domiciled in Ireland	<input type="text"/>	<input type="text"/>
Non ORD Resident	<input type="text"/>	<input type="text"/>

PERSONAL DETAILS CONTINUED

Other Personal Information

Did you hold a Full Medical Card?

Expiry date

Self (Y / N)	Spouse (Y / N)

Director of Company owning at least 15% of the Shares

Self (Y / N)	Spouse (Y / N)

Offshore Funds (Statements required for tax year):

Self (Y / N)	Spouse (Y / N)

TAX RETURN CHECKLIST

Please tick the Self and/or Spouse box and fill in the details, where relevant:

NON-PAYE INCOME

1. Income from Department of Social Protection

DOSP Statement of income for the year required.

E.g, Old Age Pension, Maternity, Illness, Disability, Jobseekers, Carers Benefit/Widows Pension etc

Please provide details below & provide a *DOSP Statement* of income for the year.

	Self	Spouse

2. Deposit Interest:

Please provide Statement

Self	Spouse

3. Dividend Income: (I.e, Income received from Shares)

Please provide Statement

Self	Spouse

4. Income from abroad (e.g foreign pension, employment, rental)

Self	Spouse

5. Rental / Self Employment Income:

If you Tick Yes, please complete the next tab (Rental Income / Self Employed Income)

Self	Spouse

6. Inheritances / Gifts / Assets

Did you inherit or receive any assets or cash?

Relationship of benefactor (E.g Parent/Aunt/Not Related)

If Yes, confirm value & date of Receipt below?

Value:

Date:

Self	Spouse

(Please note further information will be required)

7. Retirement

Have you recently retired?

Self	Spouse

If Yes, Date of retirement?

Have you had any lump sum deductions from your gratuity?

Self	Spouse

If Yes, please provide details?

--

ASSET DISPOSALS

	Self	Spouse
<p>Hace you disposed of any assets subject to Capital Gains tax (ie property, shares) ? If Yes, please confirm the below?</p>		
Cost/Market Value of		Date of Acquisition:
	Yes No	
Was Capital Gains Tax Paid?		
	Yes No	If Yes, How Much?

(Please note further information will be required)

ADDITIONAL ALLOWANCES & CREDITS

1. Health Related Expenses

a) Medical Expenses:

	Self	Spouse

Did you have any medical expenses not reimbursed by your health insurance? E.g, Prescriptions/GP/Consultant/Dental Expenses Optical etc

Please provide details:

b) Did you have any GP-referred expenses for physiotherapy or coiliac foods? Please provide details:

	Self	Spouse

c) Did you pay any nursing home fee's?

	Self	Spouse

Please provide details:

2. Remote Working Credit:

	Self (Y / N)		Spouse (Y / N)	
	Annual	Remote	Annual	Remote
	Total Bill	work days	Total Bill	work days
Electricity / Heating Bills				
Broadband				

ADDITIONAL ALLOWANCES & CREDITS CONTINUED

3. Mortgage Interest Tax Credit

Finance Bill 2023 introduces a temporary Mortgage Interest Tax Credit.

The credit is for taxpayers who have made payments in respect of a qualifying loan for a principal private residence.

To claim the credit we require documents as follows:

	Document	Provided (Y/N)
a) Mortgage statement showing balance owed on mortgage at 31st December 2022		
b) Mortgage interest certificate showing the interest at 31 December 2022.		
c) Mortgage interest certificate showing the interest at 31 December 2024.		
d) Local Property Tax (LPT) I.D. Number.		Prop ID

4. Third Level College Fees

Did you pay any 3rd level college fees for your or your dependents?

If Yes - Name of College & What Course:

Amount Paid:

Full Time Or Part Time course:

	Self	Spouse

5. Home Carer Tax Credit

Home Carer Tax Credit (Either Spouse is a full time home-maker)?

	Self	Spouse

6. Did you make any Pension payments, not deducted directly by your employer?

If so, How Much?

	Self	Spouse

7. Does your Employer pay your Health Insurance?

Provide copy of policy showing Payments & Confirm how much?

	Self	Spouse

8. Income Protection Insurance not deducted through?

Payroll? If Yes, please confirm how much

	Self	Spouse

9. Maintenance Payments made & tax deductions made?

If Yes, please confirm how much

	Self	Spouse

10. Incapacitated Child Tax Credit?

If Yes, please confirm the Below:

Full Name:

Date of Birth:

PPS:

	Self	Spouse

ADDITIONAL ALLOWANCES & CREDITS CONTINUED

11. Single Parent/Person Child Tax Credit (Co-habitation does not qualify) ?

--	--

Primary or Secondary Carer

12. Do you have any Dependant relatives who were incapacitated or over 65?

--	--

If Yes, please confirm your relationship?

Full Name:

Date of Birth:

PPS:

13. Are you Tenant entitled to claim the Rent Tax Credit?

--	--

If Yes, please complete below Rent Tax Credit Application Details Form

Note - The following are In-eligible for Rent Tax Credit

- a) if you are in receipt of HAP/RAS or any other State Housing Support Schemes, you are not eligible for the Rent Tax Credit
- b) Where the landlord is a Government Minister or a Commissioner of Public Works who owns the property in an official capacity, Creditor is a Housing Authority, or Housing Association you are not eligible for the Rent Tax Credit.
- c) The Rent Tax Credit cannot be claimed for rent paid to parents.
- d) The Rent Tax Credit cannot be claimed for rent paid to your children.
- e) The Rent Tax Credit can only be claimed for your PPR, or properties used for work or study.

a) Who are you claiming for?

Self	Child

b) I confirm that the landlord is not a Government Minister
or a Commissioner of Public Works who owns the property in an official
capacity, and is not a Housing Authority, or Housing Association *

Yes

c) PPS of Tenant?

d) I confirm tenancy is an RTB registered property?
If yes, please confirm RTB Registered number of the property

Yes

e) Are you related to your landlord?
If yes, please state the nature of your relationship

Yes	No

f) I confirm the property is my Principle Private Residence

Yes

ADDITIONAL ALLOWANCES & CREDITS CONTINUED

Tenant Rent Tax Credit Continued

Property Details:

- a) Estimated End Date of Tenancy*
- b) Rented Property Address

- c) Eircode of Rented Property
- d) Local Property Tax Property ID

Landlord / Agent Details:

- a) Landlord / Agent Address:

- b) Landlord is Irish Resident:
- c) Landlord / Agent PPS/TRN:
- d) Name of person OR Agent rent has been paid to:

Self (Y / N) Spouse (Y/N)

14. Are you a Landlord entitled to claim Residential Premises Rental Income relief?

--	--

NB - The Relief is over a 4 year period

Clawback of any Relief provide will be made by revenue where:

***Property is taken off the rent market within the 4 year period.

***LPT non compliance over the 4 year period

***RTB non Compliance over the 4 year period

- a) Confirmation I comply with registration requirements of the RTB

- B) Confirmation I am compliant with the Local Property Tax obligations on all properties owned.

- c) Confirmation I have a valid eTax Clearance Certificate.

- d) LPT ID of the property rented

Self (Y / N) Spouse (Y/N)

--	--

Self (Y / N) Spouse (Y/N)

--	--

Self (Y / N) Spouse (Y/N)

--	--

LPT ID - Self
LPT ID - Spouse

PLEASE NOTE

ALL INFORMATION ABOVE MUST BE FULLY COMPLETED OR THE CREDIT CANNOT BE APPLIED FOR WITH REVENUE

LOCAL PROPERTY TAX (LPT) SURCHARGE

If your LPT is not up to date or paid in full at the time of your income tax filing, Revenue are surcharging customers 10% of their Income Tax liability.

COLLEGE GRANT APPLICATIONS

Tax Returns that are required in early June for SUSI grant College applications will need to be provided to us by 30th April to ensure we can have the returns prepared to meet the required deadline.

DECLARATION

I understand that my tax return will be prepared based on the details I supplied in this form. If I fail to disclose all sources of income/allowances/credits. I understand that McMahon & Co cannot be held responsible for any tax related implications.

Signature:

Date:

NOTE

You can only claim for non-routine optical expenses (E,g, Laser treatment) and dental expenses where the applicable Med 1 / Med 2 Form has been completed by your Optician/GP/Dentist.

If separated/divorced, please send us a copy of any agreement or court order and details of current maintenance payments paid/received in the relevant tax year.

RENTAL INCOME FORM

TAX YEAR

Fill in this form and return it to us with your Tax Return Form
 Email - info@mcmahonandco.ie OR
 Post - McMahon & Co, 9-10 Academy Court, Academy Street, Kildare Town, Co. Kildare

RENTAL DETAILS

Full Name

Type of property (please tick)

Residential <input type="checkbox"/>	Commercial <input type="checkbox"/>	Other <input type="checkbox"/>
Section 23 <input type="checkbox"/>	Holiday <input type="checkbox"/>	

Are you registered with the residential Tenancies Board (RTB)?

Yes No

Do you have more than one property?

Yes No

If Yes, please fill out one of these sheets for each property.

Address of Property?

Date of first letting?

No. of months property was rented for in the year?

Total rent received for the year Jan-Dec?

EXPENSES CHECKLIST

Please tick and enclose a receipt/statement for any of the following expenses incurred in this year. Please note all expenses must be used wholly and exclusively for the above property.

	Enclosed	Total €
1. Mortgage Interest - Interest Certificate Required	<input type="checkbox"/>	<input type="text"/>
Please indicate the % of your mortgage that related to your rental property <input style="width: 50px;" type="text"/> %		
2. Bank Fees and Charges	<input type="checkbox"/>	<input type="text"/>
3. Residential Tenancies Board Fee (RTB)	<input type="checkbox"/>	<input type="text"/>

4. Repairs and Maintenance

5. Insurance (Property & Contents)

6. Capital Expenditure (Fixtures, Fittings, Furniture or
Electrical Goods - See Below

7. Mortgage Protection Insurance

8. Painting and Decorating

9. Accountancy Fees

10. Letting Agent Fees

11. Property Management Fees

12. Gardening

13. Any utility bills paid by you during gap in tenancies

(e.g. refuse, electricity, gas etc)

14. Any other expenses incurred in the upkeep of the property.

15. Rates (commercial only)

16. Advertising the property

17. Sundry Expenses (e.g. admin costs/phone calls/stationary)

18. Capital Expenditure (Furniture, Fittings, Building Work etc)

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

SELF EMPLOYMENT TAX RETURN FORM

TAX YEAR

Fill in this form and return it to us.

Email - info@mcmahonandco.ie OR

Post - McMahon & Co, 9-10 Academy Court, Academy Street, Kildare Town, Co. Kildare

SELF EMPLOYMENT DETAILS

Full Name:

Type of Business (Please Tick) Sole Trader Partnership

What is the nature of your business?

Date Business first commenced?

Please tick if you are registered for any of the following?

Income Tax	<input type="checkbox"/>	RCT	<input type="checkbox"/>
Vat	<input type="checkbox"/>	Employer	<input type="checkbox"/>

CHECKLIST OF RECORDS REQUIRED FOR ACCOUNTS

If your spouse is also in receipt of self-employment income, please complete the same details below for your spouse, on a separate form.

- | | Tick Yes
Enclosed |
|--|--------------------------|
| 1. Cheque Stubs & Lodgements Books - Please ensure all stubs are fully completed and legible and lodgement books with all lodgements broken down and clearly identified. | <input type="checkbox"/> |
| 2. Bank Statements (Current Account, Loan Account, Credit Card) covering all financial year. | <input type="checkbox"/> |
| 3. Vat Return Records for the financial year. | <input type="checkbox"/> |
| 4. Payroll Records for the financial year. | <input type="checkbox"/> |
| 5. Details and receipts / invoices of any capital expenditure during your financial year. | <input type="checkbox"/> |
| 6. Details of any business payments/receipts paid out of or into a private account. | <input type="checkbox"/> |
| 7. Copies of any new Finance/HP agreements taken out during your financial year. | <input type="checkbox"/> |

8. A list of the amounts you owe "Creditors" with statements for amounts owing at your year end.

9. A list of amounts owed to you "Debtors" at your year end.

10. Your work in progress at the year end (Work done not yet billed)

11. Backup of accounts and payroll software package if applicable.

This list is comprehensive, some of the information requested is already held by us in our offices. If this is the case, please ignore the request for those items and put McMahon & Co in the box next to the item, requested.