



KEOGH
ACCOUNTANCY GROUP

Self	Spouse	Income Tax Checklist 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of your Self- Employed Income & Expenditure for 2023 to include bank statements
<input type="checkbox"/>	<input type="checkbox"/>	Details of your Irish Rental Income & Expenditure for 2023, including your bank statements & mortgage interest incurred for 2023. Please be advised you must have a current RTB registration to claim a deduction for mortgage interest against rental income. (Backdating a registration is possible)
<input type="checkbox"/>	<input type="checkbox"/>	Details of Airbnb income for 2023 including bank statements, as this is taxed differently to rental income, please make sure this is distinguished.
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Foreign Rental Income & Expenditure for 2023 including bank statements, including any mortgage interest incurred.
<input type="checkbox"/>	<input type="checkbox"/>	Copy of your 2023 "Employment/Pension Summary Detail" obtainable on your Revenue "My Account". (This now replaces your P60)
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Covid19 related payments received i.e Pandemic Unemployment Payment
<input type="checkbox"/>	<input type="checkbox"/>	Copy of your final payslip in December 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Social Welfare payments received in 2023 including Unemployment Benefit, Maternity Benefit & Illness Benefit
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Foreign Bank Accounts opened in 2023 or previous years, including name and address of bank, bank account number, date initial deposit made and the amount thereof
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Irish Deposit Interest received in 2023 together with the DIRT deducted
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Irish Dividends received in 2023 together with the Withholding Tax deducted
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Pension Contributions made during 2023 for which Income Tax Relief has not been received through your employment
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Medical Expenditure incurred in 2023 not reimbursed by your Health Insurance Provider such as VHI
<input type="checkbox"/>	<input type="checkbox"/>	Details of any 3 rd level Tuition Fees paid during 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any assets acquired or disposed of during 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Maintenance Income received in 2023



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<input type="checkbox"/>	<input type="checkbox"/>	Details of any Maintenance payments made in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Fee's, Commissions or Income Settlements or Estates received in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Foreign Pension received in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Foreign Dividends received in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Foreign Deposit Interest received in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Permanent Health Insurance paid during 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any payments made under a Deed of Covenant during 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Share Options exercised in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any Income received in 2023 from Offshore Funds held
<input type="checkbox"/>	<input type="checkbox"/>	Details of any changes in your personal circumstances during 2023 that may be relevant to your Income Tax Return
<input type="checkbox"/>	<input type="checkbox"/>	Details of any rental payments made in 2023 and details of any rent paid on behalf of your child/children for student accommodation in 2023
<input type="checkbox"/>	<input type="checkbox"/>	Details of any rent a room relief if you have rented out a room under this scheme
<input type="checkbox"/>	<input type="checkbox"/>	Details if hold a full medical card (not a GP visit card)

Any other details that may be relevant to your 2023 income tax return
