

## 2 Minute Personal Tax Planning Health Check

		All OK	Needs attention	Urgent!
1.	Do you have a personal tax plan?	Yes	Don't know	No
2.	Have you reviewed the possibility of allowances claims?	Yes	Don't know	No
3.	Have you ensured income is paid gross to non tax paying members of the family?	Yes	Don't know	No
4.	Have you considered the use of trusts to fund children through higher education?	Yes	Don't know	No
5.	Have you done a self employed vs. employed review?	Yes	Don't know	No
6.	Have you reviewed your pension contributions?	Yes	Don't know	No
7.	Have you reviewed your savings and investments for tax efficiency?	Yes	Don't know	No
8.	Have you done a risk review of your savings and investments?	Yes	Don't know	No
9.	Have you got tax investigation fee protection?	Yes	Don't know	No

## Action Points

		Completed
1.		
2.		
3.		
4.		
5.		
6.		