

## TaxKiln, Letter to accountant, request my tax return and records

[Your full name]

[Your business name, if applicable]

[Your address]

[Your email + phone]

[Date]

[Accountant's name]

[Accountant's firm]

[Firm address]

Dear [Accountant's name],

Request for tax return and supporting records

I write to request copies of the following records held by you in relation to my tax affairs:

1. Tax returns filed on my behalf for the following tax years / accounting periods: [list specific years, e.g. "2022/23, 2023/24, 2024/25" or "year-ends 31 March 2023 and 31 March 2024"].
2. Supporting computations, schedules, and working papers underlying the returns at item 1.
3. Underlying accounting records for the same periods, including: trial balance, profit and loss account, balance sheet, and supporting ledger detail.
4. Source documents (receipts, invoices, bank statements) that I supplied to you and which you retained.
5. Correspondence with HMRC handled on my behalf during the same periods.
6. Our engagement letter and record of fees billed.

I confirm my UTR is [your UTR] and my Companies House number (if applicable) is [number].

I understand that, as a member of [ICAEW / ATT / CIOT / ACCA, specify], you are required by the Professional Conduct in Relation to Taxation (PCRT) to provide reasonable assistance with record transfer to a client on request. I would appreciate receipt of these records within [14 / 21 / 28] days from the date of this letter.

I am happy to receive the records via [secure file transfer / encrypted email / physical copy / specify preference]. If any reasonable administrative charge applies for retrieving older records, please let me know in advance.

Thank you for your assistance.

Yours sincerely,

[Your signature]

[Your printed name]