

Personal TaxPro Release Notes

(Personal TaxPro 2025 v4.01 - 03/03/2026)

Included in Personal TaxPro 2025 v4.01

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1. Personal TaxPro User Interface Ongoing Updates

We are continuing to refine the new Personal TaxPro user interface and will be rolling out improvements throughout the year. Your feedback is helping guide the next stages of development, so please keep sharing your suggestions as you explore the updated interface. We have prepared a short overview video of the new user interface on TaxPro PT: <https://youtu.be/0umWVZ3OMQw>. If you have not yet seen it, we would recommend that you view this as soon as possible as it provides a very helpful guide to the changes we have made.

2. Carry Forward all clients

The carry forward all option can now be run from within TaxPro. The Carry Forward Clients option can be accessed in the Data Management section of the Practice Dashboard.

Website Version - TAIN: 99999Z Practice Dashboard Tax Year 2025

Stay Informed: App Information and Alerts

Reference	Name	Tax Reference	Client Type
TRADE	Trade Record	1234567T	Individual
FINISH	Menu Tree	1234567T	Individual
EMPTEST	Irish Employment	1234567T	Individual
TEST216	Testing Married	1234567T	Individual
TEST217	Testing Single	1234567T	Individual

Client Management

- Select a Client
- Select a Partnership
- Private Clients
- Import New Clients From ROS
- Setup a new Client/Partnership
- Delete a Client/Partnership
- Export/Import a Client/Partnership

Data Management

- Carry Forward Clients
- ROS Bulk Data Import
- Data Analytics
- Key Dates Report
- Upload Clients to Portal
- Export/Import Client List

When you select Carry Forward Clients you will be given the option to select All Clients.

 I need you to choose!

Please Choose Carry Forward All Clients or Carry Forward Individual Client

Once selected you will be brought to the option to carry forward all clients from 2024 to 2025.

Carry Forward

Carry forward lets you move client details from one tax year into the next. If you choose "all clients", it will bring forward every client who hasn't already been carried forward. It won't replace or change any information for clients you've already carried forward individually.

Confirm All Clients Single Client

Select Client

Select From Year and to Year **From Year:** 2024 **To Year:** 2025

Select Carry Forward to carry forward all client to 2025.

3. 2025 UK & Irish dividend payment and dates list

Dividend information for the 2025 tax year is included in this update.

4. Change to 2025 ROS Form 11

4.1 Rental Income – Farmland Leasing Exemption

New fields have been added to the 2025 ROS Form 11 in relation to Farmland Leasing Exemption. The new fields are included in TaxPro under Rental Income. In the Rental Income record select farm leasing exemption in the section other information:

Other information	€
Farmland lease exemption	
Section 23 type property	
Property incentives 	<input type="text"/>

The new fields are the three tick boxes at the end of the screen and each tick box should be ticked if applicable.

Leased farm land

Tick if this qualifies for farm land exemption

Date of lease 

Lease term (years)

5 - 6 7 or more

Hectares

Please tick all boxes that apply if any

If any income reported includes lease income from land acquired on or after 1 January 2024 that was held for less than 7 years during the period to which the claim relates

If you are claiming exemption from the 7-year holding period under S664 as a surviving spouse or civil partner, for any lease income reported from land acquired on or after 1 January 2024

If you are claiming relief under S664 in respect of any lease income from land acquired otherwise than by purchase (e.g. by gift or inheritance) on or after 1 January 2024

4.2 Residency Details – Split Year Treatment

A new section has been included in the 2025 ROS Form 11 to enable a taxpayer claim Split Year Treatment. The new fields are included in TaxPro under Residency details:

Residency details

Split year treatment	Self	Spouse
Are you claiming split year treatment	<input type="checkbox"/>	<input type="checkbox"/>
Date of arrival	<input type="text"/>	<input type="text"/>
Date of departure	<input type="text"/>	<input type="text"/>

If split year treatment applies, then only employment income arising from the date of arrival or up to the date of departure should be entered in TaxPro.

4.3 Capital Gains Tax – Reliefs

Two new date fields have been added to the CGT reliefs section of the 2025 ROS Form 11 when claiming relief under S598 and S599 (retirement relief). The new fields are included in TaxPro in the Reliefs section of the capital gains tax summary screen:

Retirement relief within family (consideration)	<input type="text"/>	<input type="text"/>
Date of disposal for claim for retirement relief made under S599	<input type="text"/>	<input type="text"/>
Retirement relief outside family (consideration)	<input type="text"/>	<input type="text"/>
Date of disposal for claim for retirement relief made under S598	<input type="text"/>	<input type="text"/>

The new fields are highlighted above.

4.4 Capital Gains Tax – Deferred tax due under S599(4A)

Two new fields have been added to the 2025 ROS Form 11 in relation to tax previously deferred under S599(4A) now becoming due. S599(4A) provides an option for an individual to defer CGT arising on the transfer of qualifying assets on or after 1 January 2025 to a child, the value of which exceeds the €10 million lifetime limit. Where the child disposes of the qualifying assets within 12 years the deferred gain is crystallised and becomes assessed on the child along with any CGT arising on the disposal of the assets.

The new fields are included in TaxPro in the Reliefs section of the capital gains tax summary screen:

Capital gains tax

Disposal details
Gains and losses
Other Information
Reliefs

The information required below is for information purposes and has no effect on the on losses entered on the previous tab. Help 

Tick the box to indicate	Self	Spouse
If any disposal was between connected parties or otherwise not at arms length	<input type="checkbox"/>	<input type="checkbox"/>
If any disposal of assets comprised in a relevant disposal (as defined in S599(4A)(a))...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Amount of tax due S599(4A)(d)	€ <input style="background-color: yellow;" type="text"/>	€ <input style="background-color: yellow;" type="text"/>
If any of the original acquisitions were between connected parties or otherwise not at arms length	<input type="checkbox"/>	<input type="checkbox"/>
If the market values has been substituted for the cost of acquisition of any of the assets disposed	<input type="checkbox"/>	<input type="checkbox"/>

The new fields are highlighted above.

Issue with ROS 2025 RPF 11. There is an issue in relation to these new fields on the ROS RPF Form 11, Revenue validation is incorrect. If you enter details of amount of tax deferred now due under S599(4A) you will receive the following error message which prevents you from filing the Form 11:

Validation Errors

The following errors exist on this return. You must correct these errors before you can proceed.

- The amount entered on the self-assessment CGT screen part "(iv) Amount of tax previously deferred now due this period" should exactly match the amount entered as 'Amount of tax due under S.599(4)(d)(i)' on the Capital Gains screen

Revenue plan to fix the issue in their release on 20th April 2026.

4.5 Capital Gains Tax – Claim to defer payment under S599(4A)

New fields have been added to the 2025 ROS Form 11 to allow taxpayers to make a claim under S599(4A)(c) to defer CGT arising on the transfer of qualifying assets on or after 1 January 2025 to a child, the value of which exceeds the €10 million lifetime limit. The new fields are included in TaxPro in the Reliefs section of the capital gains tax summary screen:

Claim to defer payment under S599(4A)(c)	
Note: if you wish to make a claim under S599(4A)(c), to defer payment of the capital gains tax chargeable in respect of a relevant disposal (as defined in S599(4A)(a)), provide the following information in respect of each relevant disposal.	
	€
Enter amount of deferred capital gains tax (as defined in S599(4A)(a))	<input type="text"/>
Date of relevant disposal as defined in S599(4A)(a))	<input type="text"/>
Description of qualifying asset(s)	<input type="text"/>

4.6 Capital Gains Tax – Self Assessment

Two new fields have been added to the CGT Self – Assessment section of the 2025 ROS Form 11. The fields ask for details of tax deferred/deferred but now due under S599(4A):

Self assessment capital gains tax 2025	
	Self assessment €
(i) Amount of chargeable gains arising for this period	<input type="text"/>
(ii) Amount of tax chargeable for this period	<input type="text"/>
(iii) Amount of tax deferred for this period	<input type="text"/>
(iv) Amount of tax previously deferred now due this period	<input type="text"/>
(v) Amount of tax payable for this period	<input type="text"/>
(vi) Amount of any surcharge due under S. 1084 TCA 1997 because of - Late filing of this return, or - Non-compliance with your LPT requirements	<input type="text"/>
(vii) Amount of tax paid directly to the Collector General for this period	<input type="text"/>
(viii)(a) Balance of tax payable for this period	<input type="text"/>
(viii)(b) Balance of tax (overpaid) for this period	<input type="text"/>
I declare the above to be my self assessment to capital gains tax for the year 2025	<input type="checkbox"/>

The new fields are highlighted above and will be autofilled from the information entered in the corresponding fields of the reliefs section of the capital gains tax screen.

5. 2025 Form 12

Form 12 2025 is included in this release. The TaxPro Form 12 can now be printed and posted directly to Revenue.

6. 2025 Form CG1 for Form 12 Clients

Form CG1 2025 for Form 12 clients is included in this release.

7. Future ROS updates to 2025 ROS Form 11

Revenue have indicated that they plan another update to the 2025 ROS Form 11 on 20th April 2026. The update will include the following:

- Sports bodies donations.
- S1008A tick box and additional field for the name of the medical partnership.
- Exempt income, S216F (repair of musical instruments) to be itemised as an exemption.
- CGT – Fixing validation errors.
- Fix for the Widowed Person/Surviving Spouse credit with dependent children. Revenue have identified an issue on the RPF Form 11 where the credit is being calculated at €1,875 instead of €2,000.

8 Some Other Information



Upcoming TaxPro Training – Book Your Session

We are pleased to announce new **TaxPro Practical Training** sessions covering:

- The **new TaxPro UI**
- Full end-to-end workflow
- Integrations with **Go Tax Connect** and **Go Client Connect**

Sessions run from **10:00 am to 1:00 pm** on multiple dates.

👉 **Book your place here:** [Taxpro training booking](#)

These sessions are ideal for both new users and experienced staff who want to get the most out of the updated interface and connected tools.



Prior-Year Access Change – Effective June 2026

From **June this year**, we will be limiting the number of prior years' available in the software to **seven**. This change aligns with industry best practice and supports responsible data-minimisation standards.

This helps ensure:

- Better performance.
- Reduced data-retention risk.
- Compliance with modern data-management expectations.



Don't Forget: Go Tax Connect – Free Trial Available

Go Tax Connect is available on a **free trial** and is a powerful way to streamline client data collection.

With it, you can:

- Generate a **unique URL** for each client's tax return.
- Allow clients to complete as much or as little information as you request.
- Import that data directly back into TaxPro.
- Reduce manual data entry across your practice.

- Add **non-TaxPro custom questions** to your data-collection form.

It's a simple, secure, and efficient way to gather information.

Client Portal – Now Fully Linked to TaxPro

Our enhanced **Client Portal**, now fully integrated with TaxPro, makes sharing information with clients seamless.

Benefits include:

- No more emailing documents back and forth.
- A single, centralised location for all client data.
- Share information with the personal and **corporation tax** software.
- Reduced risk of lost information.
- A smoother, more professional client experience.

Everything stays organised, secure, and easy to access.

Do not hesitate to contact us to book an online demo.