

## 2009-2010 Tax Return Questionnaire

All information supplied must only relate to the period 6<sup>th</sup> April 2009 to 5<sup>th</sup> April 2010

Where there is insufficient space, please note details on attached sheet.

### Part A: Main Tax Return Questions

1. Do you have an outstanding student loan? Yes  No
2. Set out details of bank and building society interest received on all personal accounts. If a **joint accounts please only enter your share.**

Account Numbers			
Bank/Building Society			
Net Interest Received			

3. Please confirm the number of shares you hold in **your own limited company** and the amount of dividends declared by your company (excluding amounts paid to other shareholders).

Number of Shares held	Date of declaration	Net dividend (£)

4. Do you own any other shares from which you have received dividend income in the year to 5th April 2010? (Including those acquired from the public share issues for the utility companies or acquired on the demutualisation of some Building societies).

Yes  No

If yes, please provide details of:

Company Name			
Date Paid			
Net Dividend (£)			

If there were more than three such dividends please provide details of the further dividends on a separate sheet of paper.

Would you please provide copies of any dividend vouchers where the dividend is from an overseas company? It is important that your Tax Return includes details of any foreign tax deductions.

5. In the year to 5th April 2010 did you **receive** a state pension, or any pension payments from a former employer? Yes  No

If yes, please provide details of:

Gross amount of pension received (from P60)	
Tax deducted from the pension, if any (P60)	
Membership Number	

6. In the year to 5th April 2010, did you receive any form of state benefits?

Yes  No

If yes, please send a copy of your P45 or P60 and provide the following details:

Nature of Benefit	
Net Amount received	
<b>Please Note : Do Not Include Child Allowance or Working Tax Credits</b>	

7. Please detail on a separate sheet any other income received you feel may be relevant.

8. Detail any personal pension premiums **paid** during the year ended 5<sup>th</sup> April 2010. Please note this should **NOT** include any payments made directly from your own limited company.

Pension Company	
<b>Actual amount</b> of Premiums paid to 5 <sup>th</sup> April 2010	

9. Details of any payments made under deed of covenant, gift aid scheme etc..

Name of Charity	Total Donation (£)

10. Are you party to any disclosable tax avoidance schemes? Yes  No

If yes, please provide the following details

Scheme Reference Number	Tax year expected advantage arises

## 2009-2010 Tax Return Questionnaire

All information supplied must only relate to the period 6<sup>th</sup> April 2009 to 5<sup>th</sup> April 2010

Where there is insufficient space, please note details on separate sheet.

### Part B: Employment Tax Return Questions

1. Details of income from **any employment other than your own limited company**. (This should include your previous employment details where you have commenced contracting during the 2009/2010 tax year.)

#### **Employment 1**

Employers Name		
Employers Tax Reference Number (Shown on your P45/P60)		
Dates of employment in this tax year	Start:	End:
Gross income received in this tax year		
Tax deducted under PAYE		
Tax Code		

Benefits provided - if a **P11D** is held please forward a copy.

#### **Employment 2**

Employers Name		
Employers Tax Reference Number (Shown on your P45/P60)		
Dates of employment in this tax year	Start:	End:
Gross income received in this tax year		
Tax deducted under PAYE		
Tax Code		

Benefits provided - if a **P11D** is held please forward a copy.

2. Details of income from **any foreign employment** during the 2009/2010 tax year.

Employers Name		
Country of Employment		
Dates of employment in this tax year	Start:	End:
Currency in which salary paid		
Amount of Salary Paid before tax		
Amount of tax deducted		

## 2009-2010 Tax Return Questionnaire

**All information supplied must only relate to the period 6<sup>th</sup> April 2009 to 5<sup>th</sup> April 2010**

**Where there is insufficient space, please note details on separate sheet.**

### Part C: Additional Supplementary Page Questions

**1. UK Property**

Did you receive any income from property?      Yes       No

If yes, please confirm the number of properties     

Do you expect to receive such income also during the 2010/11 tax year?      Yes       No

Are any properties furnished holiday lets?      Yes       No

**For each property please provide the following information:**

Property Address:			
How is your property let:	Furnished <input type="checkbox"/>	Unfurnished <input type="checkbox"/>	
Is the property joint owned:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
If Yes: Name of Co-Owner(s)	<input style="width: 100%; height: 20px;" type="text"/>		
My share of income and outgoings is (%)	<input style="width: 100%; height: 20px;" type="text"/>		
Rent receivable for the year to 5 <sup>th</sup> April 2010 (£)	<input style="width: 100%; height: 20px;" type="text"/>		

**Rental Expenses**

Mortgage Payments (Interest Element Only)(Note 1)	£
Mortgage Arrangement Fee	£
Letting/Management Fees	£
Advertising Costs	£
Service Charges	£
Ground Rents	£
Cost of Repairs (Exclude improvement costs)(Note 2)	£
Maintenance Costs (Include Safety Certificates)	£
Building Insurance	£
Contents Insurance	£
Council Tax or Water Rates paid	£
Utility Bills Paid	£
Travel costs visiting property	£
Other as Specified :	£

Note 1: Please forward a copy of the Interest Certificate for the year to 5 April 2010.

Note 2: You may claim for 'energy saving' improvements e.g. wall/loft insulation.

2. **Capital Gains**

Please provide details of any assets disposed of which could give rise to a chargeable gain (e.g. shares, property other than private residence, business assets). Include details of amounts paid for the assets and the proceeds of sale.

Asset disposed	Amount paid	Date of Disposal	Sale Proceeds

If you are declaring any items above then we will contact you for further details.

3. **Non Resident in UK (Note 1)**

Do you consider yourself to be non resident in the UK for this tax year?

Yes  No

If yes, we will contact you for further details.

**Note 1:** Broadly, you are resident in the UK if you spend at least half of a tax year here, or regularly spend at least one quarter of a tax year here.

**Part D: Declaration**

Please tick here  to confirm that the information you have given on this questionnaire is correct and complete to the best of my knowledge and belief.

**Name :**

**Date:**