

## **Personal Tax Return 2009**

As a director of a UK limited company you are obliged to make a return of your taxable income and capital gains, and any other documents requested, for the year from 6<sup>th</sup> April 2008 to 5<sup>th</sup> April 2009.

You must submit your tax return to HMRC before 31<sup>st</sup> October 2009 (if submitting a paper return) or **31<sup>st</sup> January 2010** (if filing a return online).

You will be charged a £100 penalty if your tax return is received after the appropriate deadline.

Any outstanding tax liabilities must be paid before **31<sup>st</sup> January 2010**. If you pay late you will be charged interest and possibly a surcharge.

If you would like Danbro to assist with the preparation of your tax return please;

- complete the details in part a
- complete part b of the questionnaire,
- complete questionnaire parts c and d (Note 1), if necessary
- sign the declaration in part e and
- return to our offices **before 1<sup>st</sup> December 2009**.

### **Part A: Personal Details**

**Name:**

**National Insurance Number:**

**Date of Birth:**

**Unique Tax Reference (Note 2):**

**Tax Office:**

**Note 1:** If your tax return includes supplementary pages, as per part d, an additional fee of £80 plus vat per page may be charged.

**Note 2:** You **must have** a valid Unique Tax Reference (UTR) to allow online filing. In the event that an UTR is not shown above please provide. This can be found on correspondence sent from HMRC, or can be ascertained by contacting your local tax office. Contact details can be found at [www.hmrc.gov.uk/local/individuals/index.htm](http://www.hmrc.gov.uk/local/individuals/index.htm).

**Finally, please note that if we do not receive a completed tax return questionnaire we will assume that you have made alternative arrangements to file your return.**

## **2008-2009 Tax Return Questionnaire**

All information supplied must only relate to the period 6<sup>th</sup> April 2008 to 5<sup>th</sup> April 2009

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

**Part B: 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 account 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 2009? (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 2009 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 (from P60) : _____
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- 6) In the year to 5th April 2009, 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: _____  Please Note: Do Not Include Child Allowance or Working Tax Credits
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- 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 2009. Please note this should **NOT** include any payments made directly from your own limited company.

Pension company: _____ Net Premiums paid to 5 <sup>th</sup> April 2009 _____
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- 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

**2008-2009 Tax Return Questionnaire**

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

### **Part C: 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 2008/2009 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 2008/2009 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		

### **2008-2009 Tax Return Questionnaire**

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

**Part D: 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 2009/10 tax year? (Yes/No)

Are any properties furnished holiday lets? (Yes/No)

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

Property Address : _____ _____
How is the property let :      Furnished/Unfurnished
Is the property jointly owned? Yes/no    Name of Co-Owner(s) : _____ My share of the income and outgoings is : _____%
Rent receivable for the year to 5 April 2009 : £ _____
<b><u>Rental Expenses</u></b>
Mortgage Payments (Interest Element Only) : £ _____ (see note 1)
Mortgage Arrangement Fee : £ _____
Letting/Management Fees : £ _____
Advertising Costs : £ _____
Service Charges : £ _____
Ground Rents : £ _____
Cost of Repairs (Exclude improvement costs) : £ _____ (see 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 2009.

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 E: Declaration**

The information that I have given on this questionnaire is correct and complete to the best of my knowledge and belief

**Name:** \_\_\_\_\_

**Signed:** \_\_\_\_\_

**Dated:** \_\_\_\_\_