

TAX RETURN QUESTIONNAIRE



TAX YEAR 2008/2009

Dear Client, please provide the information requested below:
 (All details apply only to period 6th April 2008 to 5th April 2009)

Supporting documents attached?

Name

1 **Marital Status** (tick): Married Single Divorced Separated

2 **Rental Property** Owned, including Foreign

Address	Rent Received	Expenses Incurred
	£	£
	£	£
	£	£

3 **Self Employed** - please provide books and records

4 **Employed**

Name and Address of Employer

Enclose form **P60** or **P45** for year 2008/2009

5 **Own Company Shares, Stocks or Unit Trusts**

Company	Quantity Held	Class

Enclose **Dividend Vouchers** if available for year 2008/2009

6 **Savings Accounts**

Bank/Build Soc/Institution Name	A/C Name	A/C No.	Net Interest	Tax Deducted	In Joint Names?
			£	£	Y/N
			£	£	
			£	£	
			£	£	

7 Pensions Received

If receiving State Pension - Weekly Amount for year 2008/2009

£

If Company Pension, enclose form **P60** for year 2008/2009

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8 State Benefits

Type of Benefit	Amount Received
	£
	£
	£

9 Other Income eg Estate income

Source of Income	Amount Received	Tax Deducted at Source
	£	£
	£	£
	£	£

10 Contributions to a Pension Plan

Institution Name	Type: see below	Scheme No.	Contributions
			£
			£
			£

insert code: ↑ PP Personal Pension
 ES Employers Scheme
 RA Retirement Annuity

11 Charitable Gifts Made/ Planned for Next Tax Year

Charity Name	Amount Given This Year
	£
	£
	£

Charity Name	Intended Amount for next tax year
	£
	£
	£

12 Loans to invest in business, partnership or limited company

Lender	Purpose of loan	Interest paid in the tax year
		£
		£
		£

Enclose loan interest certificate

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13 Disposal of Assets (shares, land, property)

Item	Date of Acquisit'n	Purchase Cost	Date of Sale	Net Proceeds of Sale

14 Income/Outgoings Changes

Please List other income sources or changes in income/outgoings since last tax year.

Details of income/outgoings:

15 Domicile Status

If your father has a foreign nationality please tick the box.

We will contact you about the implications to your tax affairs, if any.

Thank You - don't forget the attachments required for some items

Your business is appreciated, please rate this questionnaire so that we may improve our service to you

Straightforward

Difficult to understand

Other comment.....