

TAX RETURN QUESTIONNAIRE FOR THE 2022/23 TAX YEAR

Dear client, please provide the details requested below or attach extra sheets.

(Details apply to the period running from 6 April 2022 to 5 April 2023).

Supporting documents
attached?
(Tick boxes).

Full Name :

1a **Marital Status** (please circle): Single Married Civil Partnership Separated Divorced Widowed

1b **Date status changed:** _____

2 **Rental Properties Owned**, including foreign (include any foreign taxes paid under expenses):
(Please indicate if any of these properties have been your main residence previously.)

Address (specify if this is a holiday let)	Rent received (£)	Expenses incurred (£)

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3 Employments & Directorships

Employer Name & Address / Payments, Benefits & Expenses not on P60, P45 nor P11D (£)

Attach form P60 or P45 for year 2022/23.

Also attach form P11D for year 2022/23 if you had employment benefits and expenses.

List above any directorships held at any point in 2022/23, even if no remuneration was received.

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4 Company Shares (including own), Stocks or Unit Trusts

Company	Quantity Held	Class

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Attach Dividend Vouchers and investment portfolios if available for year 2022/23.

5 Savings Accounts (other than ISAs), National Savings Investments, or Bonds

Bank/Build Society / Institution Name	A/C Name	A/C Number	Net Interest (£)	Tax Deducted (£)	In Joint Names?
					Y/N
					Y/N
					Y/N
					Y/N

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6 Pensions Received

If receiving State Pension, enter weekly/4-weekly (specify) amount for 2022/23: £.....

If receiving other Pension, attach form P60 for 2022/23.

☐**7 Self-Employed in 2022/23? If so, provide books and records (please circle): Yes No**☐**8 Taxable State Benefits** e.g. jobseekers, incapacity, or bereavement allowance.

Type of Benefit	Amount Received (£)

☐**9 Other Income** e.g. Royalties, estate income (attach R185(s)), or life assurance withdrawals over 5%.

Source of Income	Amount Received (£)	Tax Deducted (£)

☐**10 Contributions to a Pension Plan**☐

Institution Name	Personal Pension, Employer Scheme, or Retirement Annuity?	Scheme Number	Specify employer / Net Personal Contributions (£)

11 Charitable Gifts Made in 2022/23 or Planned for Next Tax Year.

Charity Name	Net amount given in 2022/23 (£)

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Charity Name	Net intended amount for next tax year (£)

☐**12 Loans to Invest in Business, Partnership, or Limited Company (including Directors Loan Account)**

Business	Purpose of loan	Interest paid in 2022/23 (£)

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13 **Asset Acquisition & Disposal** (e.g. shares, land, property, currency trading). Also list assets that lost their value.

Asset details e.g. type of asset, quantity held, institution, class, address, acres, proportion owned if jointly held etc.	Date Acquired	Purchase Cost (£)	Date of Sale	Net Sale Proceeds (£)

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14 **Other Changes** Please list below any other changes in contact details/income/outgoings/assets/reliefs (e.g. EIS/SEIS/VCT/SITR relief, in which case attach certificates) since the start of 2022/23.

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15 **Residence and Domicile Status**

Does your father have a foreign nationality? (Please circle):

Yes No N/A

Were you UK resident for 2022/23? (Please circle):

Yes No Uncertain

16 **Child Benefit**

Complete this section if you have children under 18 and your income is above £50,000, and higher than your partner's income for the 2022/23 tax year.

Did you (or a partner with whom you co-habit) receive child benefit during the year ended 5 April 2023? (circle):

Yes No N/A

If yes, how much was received in that year?

£.....

Also if yes, how many children did you receive child benefit for in that year?

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17 **Student Loan**

Complete this section if you had an income contingent student loan at any time during the year ended 5 April 2023.

Did you have an income contingent student loan outstanding during 2022/23?

Yes No

If so, which plan were you on?

Plan 1 Plan 2 Plan 5

(Plan 1 - if you started your course before 1 September 2012).

(Plan 2 - if you started your course between 1 September 2012 and 31 July 2023).

(Plan 5 - if you started your course on or after 1 August 2023).

Date loan repaid if before 5 April 2023

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If you were employed, were any loan deductions made from your salary? (If so, please attach all payslips for the 2022/23 tax year).

Yes No N/A

18 **Transferable Tax Allowances for Married Couples and Civil Partners**

Complete this section if your income was between £12,570 - £50,270.

Has your spouse/civil partner fully utilised their personal allowance of £12,570?

Yes No N/A

If no, what is their total taxable income for the 2022/23 tax year?

£.....

Thank you for taking the time to complete the Tax Return checklist.

Please do not forget the attachments required.