

TAX RETURN QUESTIONNAIRE

Tax year 6th April 2021 to 5th April 2022

Please ensure you answer **ALL** questions (click appropriate Y/N box) and provide supporting documentation

1. PERSONAL DETAILS

Client Name: -

Address UK: -

(If changed from last year – date of change): -

Address Overseas: -

(If providing an overseas address, please ensure you complete Accommodation Overseas Questionnaire)

Home Tel: - Mobile: -

Email: -

Alternative Email: -

National Insurance Number: -

Date and place of Birth: -

Marital Status (single, living with partner, married, separated, divorced): -

Date of Event: -

Spouse/partner name: -

Is spouse/partner living in the UK? Y N

Spouse/Partner National Insurance Number: -

2. EMPLOYMENT

Were you employed in the tax year? Y N

If yes, please provide the form P60/ Payslips for each month – April – March as provided by your employer. (UK Employers & Overseas employers)

Did you receive benefits in kind

(e.g., Company Car, Medical Benefits etc.) during the tax year? Y N

If yes, please provide the form P11D or P9D from your employer. (UK Employers Only)

Did you incur any expenses (e.g., Professional Subscriptions etc.)

in doing your job during the tax year? - Y N

(PLEASE NOTE: Travel between home and work is not included).

Did you commence or cease employment during the tax year? Y N

If yes, provide commencement and/or cessation dates: -

Also, provide P45 or your last payslip from your employer

Do you have a Student Loan repayable? Y N

If so, how much did you pay during the tax year: -

Did you pay via salary? Y N

Did you pay directly to Student Loan Company? Y N

If yes, please provide copy of receipt or statement

Is the loan due to be fully repaid in the next two years? (If so, please confirm date): -

Did you receive foreign earnings in the tax year? Y N

If yes, details of gross amounts earned and from whom: -

(Please provide copies of payslips)

If Overseas tax paid, please provide supporting documentation.

Please provide copies of all new contracts of employment under which you worked during the tax year, including any appendices outlining your T&Cs.

Do you qualify for Seafarers Deduction? Y N

(If yes, please complete enclosed SED form)

3. SELF-EMPLOYMENT

Were you self-employed or a partner in a partnership during the tax year? Y N

If yes, please provide Income and Expenses

4. PENSION INCOME

Did you receive any pension income? (UK or Foreign) Y N

If so, please provide a copy of the P60 or details of gross pension payments and any tax deducted.

5. LAND & PROPERTY

Have you received any Rental Income from the UK or Overseas? Y N

If yes, please state the number of properties: -

Please supply details of Income and Expenses for each property,

(Including Mortgage Interest Certificates(s) for the tax year ended 5 April).

See changes to mortgage interest tax relief : <https://www.gov.uk/government/news/changes-to-tax-relief-for-residential-landlords>

Was each property jointly let? Y N

(If so, provide details of joint landlord)

6. CAPITAL GAINS

Have you sold any assets or shares during the tax year? Y N

If yes;

| | |
|------------------|--|
| Type of asset | |
| Purchase price £ | |
| Sale proceeds £ | |
| Date of purchase | |
| Date of sale | |

Have you made any gains on UK life insurance policies, annuities or capital redemption policies, or AVC's? Y N

If yes, please provide copies of relevant documentation i.e. Chargeable Event Certificate etc.

7. INCOME FROM SAVINGS AND INVESTMENTS

Did you receive any bank/building society interest from your savings in the tax year? Y N

If yes, please provide interest certificates or provide details below, or use a separate sheet

| Name of Bank | Sort Code | Account No | Gross | Tax | Net | Joint/self |
|--------------|-----------|------------|-------|-----|-----|------------|
| | | | | | | |
| | | | | | | |

Did you receive any dividends in the tax year? Y N

If yes, please provide interest certificates or provide details below, or use a separate sheet

| Company Name | Gross | Tax | Net | Joint/self |
|--------------|-------|-----|-----|------------|
| | | | | |
| | | | | |

8. GOVERNMENT PAYMENTS RECEIVED

Did you receive any of the following income during the tax year?

Y N

If yes, please provide amounts received in the year

| | |
|--|--|
| State Retirement Pension | |
| Universal Credit | |
| Carers Allowance | |
| Statutory Sick pay/Maternity/Pay from HMRC | |

PLEASE NOTE: it is **IMPORTANT** to provide the amounts, if you have answered “**YES**” to any of the above benefits.

9. PENSION CONTRIBUTIONS

Did you contribute to a personal/stakeholder pension in the tax year?

Y N

If yes, how much was paid during the year? (if via salary please provide copies of payslips)

Gross: - £ Net:- £

To whom: -

Pension/contract number: -

10. High Income Child Benefit Charge

Did you or your partner make a claim for child benefit during the year?

Y N

If yes please provide the following details;

Date(s) of birth of Child(ren) for whom the claim was made: -

Amount of Child benefit received per week: -

Date Child Benefit ceased (or is expected to cease): -

11. ANY OTHER INCOME OR ALLOWABLE PAYMENTS

Did you receive **any other income or make any allowable payments** apart from those already mentioned in this questionnaire?

e.g., Trusts, overseas sources

Y N

If ‘yes’, please give details: -

Did you make any Charitable Contributions under Gift Aid?

Y N

If yes, please provide details: -

12. TAX REPAYMENT (if Applicable)

Please provide bank account details into which you require the repayment to be issued

| | |
|------------------------|--|
| Bank/Building Society | |
| Account holder(s) name | |
| Sort code | |
| Account number | |

DECLARATION

I hereby certify that the above information provided is accurate and authorise **Tax Safe Ltd** to complete my Income Tax Return. I acknowledge that I am fully responsible for all of the information entered on the Income Tax Return.

Print Name

Date

March 2022