



## 2011 Tax Return Questionnaire

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

D.O.B. \_\_\_\_\_

(please circle Y/N where applicable)

### Section 1 - Self Employment

Did you have any self-employed or partnership income in the year ended 5th April 2011? Y N

If your accounts for the period have been completed, please go to Section 2.

**IF NOT, PLEASE FORWARD YOUR BOOKS AND RECORDS TO THE OFFICE AS SOON AS POSSIBLE**

### Section 2 - Employment

Were you employed during any part of the year ended 5th April 2011? Y N

**IF YES, PLEASE PROVIDE A COPY OF YOUR FORM P60 FOR THE YEAR AND P11D IF APPLICABLE**

**If the payroll of your employer is dealt with by FFT, the relevant information will be held at this office**

### Section 3 - Pensions

Do you receive a pension from either the State, a private source or a former employer? Y N

**IF YES, PLEASE PROVIDE FORM P60 OR ALTERNATIVE DOCUMENTS CONFIRMING AMOUNTS**

### Section 4 - Investment Income

Did you receive any of the following types of income:	Bank interest	Y	N
	Building Society interest	Y	N
	National Savings interest	Y	N
	Dividends from share holdings	Y	N
	Any other investments	Y	N

**IF YES TO ANY OF THE ABOVE, PLEASE PROVIDE THE RELEVANT CERTIFICATES AND/OR VOUCHERS**

### Section 5 - Rental Income

Do you have any properties, either in the UK or overseas, available for letting? Y N

**IF YES, PLEASE PROVIDE DETAILS OF RENTAL INCOME AND EXPENSES**

### Section 6 - Other Income

Did you receive any other sources of income not included in Sections 1 to 5, including income from overseas sources? Y N

**IF YES, PLEASE PROVIDE FULL DETAILS**

Continued Overleaf

**Section 7 - Reliefs**

Do you make Personal Pension payments? Y N

Do you make Retirement Annuity payments? Y N

Do you make any Charitable Contributions under Gift Aid? Y N

Do you make any Loan Interest payments on which you are entitled to relief? Y N

**IF YES TO ANY OF THE ABOVE, PLEASE PROVIDE DOCUMENTS CONFIRMING THE AMOUNTS**

**Section 8 - Capital Gains**

Did you dispose of any assets during the year? (if no, go to Section 9) Y N

Were the assets disposed of worth £40,400 or more? Y N

Was the gain on the disposal £10,100 or more? Y N

Did you make any Capital Losses in the year? Y N

**IF YES, PLEASE PROVIDE FULL DETAILS**

**Section 9 - Pre-owned Assets**

Please provide details if you, since 6th April 2010, have given away an interest in land, buildings or chattels from which you may continue to benefit from, or from an asset derived from a gift? Y N

**THIS IS A TECHNICAL AREA, IF YOU ARE UNSURE PLEASE CONTACT THIS OFFICE**

**Section 10 - Student Loans**

Have you had the benefit of a Student Loan that has not been fully repaid? Y N

**IF YES, PLEASE CONFIRM THE METHOD OF REPAYMENT**

**Section 11 - Other Information**

If there is any further information which has not been requested in Sections 1 to 10 and you think that it may be relevant to your tax return, please fill in the details below

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

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

Mobile No: \_\_\_\_\_

Please state whether you would prefer to receive appropriate correspondence via e-Mail Y N

Please provide your current e-Mail address \_\_\_\_\_

**PLEASE ENSURE THE RELEVANT PAPERS ARE RETURNED WITH THIS FORM**