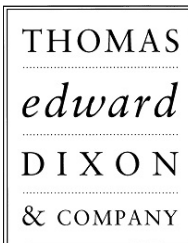


2025/26 PERSONAL TAX RETURN QUESTIONNAIRE

Full name:

This questionnaire covers the period from **6 April 2025** to **5 April 2026**

Please answer **all** questions and return to me. Where you answer 'Yes' to any questions please ensure that you **forward supporting documents and/or records** as indicated.



	No	Yes	<i>If 'yes' please provide:</i>	Encl.
1. <u>Employment Income</u>				
a) Did you receive income as a director or employee under PAYE?			<i>Form P60 or P45 for 2025/26</i>	
b) Did you receive taxable Benefits in Kind (BIK's)?			<i>Form P11D for 2025/26</i>	
2. <u>Self employment / Partnership Profits</u>				
a) Did you receive income from Self Employment and/or a Partnership?			<i>Full records</i>	
b) Did you start or cease a business after 5 April 2025			<i>Full details of change</i>	
3. <u>Income from Land and Property</u>				
a) Did you receive rent or other income from property and/or land?			<i>Details of income and expenditure</i>	
b) Do you pay interest on loans relating to the above property or land?			<i>Statements of interest paid</i>	
4. <u>Interest Received</u>				
a) Did you receive interest from a bank or building society?			<i>Tax certificate or copies of statements</i>	
b) Did you receive any other interest?			<i>Tax certificate or copies of statements</i>	
5. <u>Dividends</u>				
a) Did you receive dividends from any company shareholdings?			<i>Dividend vouchers (unless we prepare them)</i>	
6. <u>Pensions and State Benefits</u>				
a) Did you receive a state pension?			<i>Full details of amounts received</i>	
b) Did you receive a personal / occupational pension?			<i>Form P60 for 2025/26</i>	
c) Did you receive any unemployment benefits?			<i>Statement of benefits</i>	
d) Were you or your partner in receipt of child benefit?			<i>Amounts received and no. of children</i>	
e) Did you receive any other taxable social security benefits?			<i>Full details of amounts received</i>	
7. <u>Capital Gains</u>				
a) Did you sell or gift any capital assets? (e.g. shares, property, antiques, paintings)			<i>Full details & supporting documents</i>	
8. <u>Contributions to Pension Schemes</u>				
a) Did you make contributions towards a private pension / retirement annuity during the year?			<i>Full details of contributions</i>	
9. <u>Other Information</u>				
a) Did you make any donations during the year and indicate 'Gift Aid'?			<i>Full details of donations</i>	
b) Has your marital status changed since 5 April 2025?			<i>Full details</i>	
c) Do you have an outstanding student loan?			<i>Full details</i>	
d) Are there any other circumstances that you think may be relevant to your tax affairs?			<i>Full details</i>	

I confirm I have disclosed and provided all the relevant information

Signed

Dated