

2023/24 PERSONAL TAX RETURN QUESTIONNAIRE

Full name:

This questionnaire covers the period from **6 April 2023** to **5 April 2024**

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	If 'yes' please provide:	Encl.	To follow
1. Employment Income					
a) Did you receive income as a director or employee under PAYE?					Form P60 or P45 for 2023/24
b) Did you receive taxable Benefits in Kind (BIK's)?					Form P11D for 2023/24
2. Self employment / Partnership Profits					
a) Did you receive income from Self Employment and/or a Partnership?					Full records
b) Did you start or cease a business after 5 April 2023					Full details of change
3. Income from Land and Property					
a) Did you receive rent or other income from property and/or land?					Details of income and expenditure
b) Do you pay interest on loans relating to the above property or land?					Statements of interest paid
4. Interest Received					
a) Did you receive interest from a bank or building society?					Tax certificate or copies of statements
b) Did you receive any other interest?					Tax certificate or copies of statements
5. Dividends					
a) Did you receive dividends from any company shareholdings?					Dividend vouchers (unless we prepare them)
6. Pensions and State Benefits					
a) Did you receive a state pension?					Full details of amounts received
b) Did you receive a personal / occupational pension?					Form P60 for 2023/24
c) Did you receive any unemployment benefits?					Statement of benefits
d) Were you or your partner in receipt of child benefit?					Amounts received and no. of children
e) Did you receive any other taxable social security benefits?					Full details of amounts received
7. Capital Gains					
a) Did you sell or gift any capital assets? (e.g. shares, property, antiques, paintings)					Full details & supporting documents
8. Contributions to Pension Schemes					
a) Did you make contributions towards a private pension / retirement annuity during the year?					Full details of contributions
9. Other Information					
a) Did you make any donations during the year and indicate 'Gift Aid'?					Full details of donations
b) Has your marital status changed since 5 April 2023?					Full details
c) Do you have an outstanding student loan?					Full details
d) Are there any other circumstances that you think may be relevant to your tax affairs?					Full details

I confirm I have disclosed and provided all the relevant information

Signed

Dated