

# 2021/22 PERSONAL TAX RETURN QUESTIONNAIRE

**Full name:**

This questionnaire covers the period from **6 April 2021** to **5 April 2022**

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.

	<b>No</b>	<b>Yes</b>	<b><i>If 'yes' please provide:</i></b>	<b>Encl.</b>
<b>1. <u>Employment Income</u></b>				
a) Did you receive income as a director or employee under PAYE?				<i>Form P60 or P45 for 2021/22</i>
b) Did you receive taxable Benefits in Kind (BIK's)?				<i>Form P11D for 2021/22</i>
<b>2. <u>Self employment / Partnership Profits</u></b>				
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 2021				<i>Full details of change</i>
<b>3. <u>Income from Land and Property</u></b>				
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>
<b>4. <u>Interest Received</u></b>				
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>
<b>5. <u>Dividends</u></b>				
a) Did you receive dividends from any company shareholdings?				<i>Dividend vouchers (unless we prepare them)</i>
<b>6. <u>Pensions and State Benefits</u></b>				
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 2021/22</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>
<b>7. <u>Capital Gains</u></b>				
a) Did you sell or gift any capital assets? (e.g. shares, property, antiques, paintings)				<i>Full details &amp; supporting documents</i>
<b>8. <u>Contributions to Pension Schemes</u></b>				
a) Did you make contributions towards a private pension / retirement annuity during the year?				<i>Full details of contributions</i>
<b>9. <u>Other Information</u></b>				
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 2021?				<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