



**SELF-ASSESSMENT TAX RETURN QUESTIONNAIRE
FOR THE YEAR ENDED 5 APRIL 2011**

To guarantee completion of your 2010/11 tax return before the filing deadline of the 31st January 2012 this questionnaire must be returned by the 30th September 2011.

Name:

Business Name(s):

Signature:

A fee of £80 plus VAT will be charged if amendments have to be made as the result of incomplete or incorrect information received.

1 INVESTMENT INCOME

'✓' as Appropriate

1.1 Did you receive any interest on bank or building society accounts during the tax year Yes No

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If yes give details below:-

Please note, we require details from personal savings and deposit accounts only. Do not include business accounts here and **do not include Cash ISAs**

Accounts opened before 6 April 2010

Name of Bank/Building Society	Date Account Closed (If During The Tax Year)	Interest Received (£) (06/04/10-05/04/11)			Joint Act? (y/n)
		Gross	Tax	Net	

Accounts opened during the tax year

Name of Bank/Building Society	Date Account Opened/Closed	Interest Received (£) (06/04/10-05/04/11)			Joint Act? (y/n)
		Gross	Tax	Net	

'✓' as Appropriate

1.2 Did you receive any dividends on shares during the tax year? Yes No

If yes give details below:-

Name of Company	Quantity Of Shares Held	Dividends Received (£) (06/04/10-05/04/11)	
		Dividend	Tax Credit

2 INCOME FROM LAND & PROPERTY

2.1 Did you receive any income from renting land or property during the tax year? Yes No

If no go to question 3.
 If yes give details below:-

2.2 If you are renting property, is the property let furnished? Yes No

2.3 Is the property held jointly? Yes No
 How many joint holders receive a share of the rent? _____

2.4 Please provide the amount of mortgage interest paid during the 2010/11 tax year.
 £ _____

2.5 The address of the property.

Rents receivable 06/04/10-05/04/11 £ _____

EXPENSES		
Date	Description	Amount (£)

3 CAPITAL GAINS

'✓' as Appropriate

3.1 Did you dispose of any capital items/assets during the tax year?
i.e. Land & property (other than your main residence), shares,
etc.

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes give details below:-

Description Of Asset	Date Purchased (dd/mm/yyyy)	Purchase Price (£)	Date Sold (dd/mm/yyyy)	Disposal Value (£)

Please give details of any expenses (e.g. legal/agents, etc.) incurred in the purchase and/or disposal of the asset.

Please attach documentation (e.g. completion statements) relating to sale or purchase of items together with details of any enhancement expenditure.

4 EMPLOYMENTS, PENSIONS AND BENEFITS

4.1 Were you in paid **employment** at any time during the year ended 5 April 2011?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes please state:

Date of commencement.

Date of leaving, if appropriate.

Did you have any benefits in this employment, please supply details of any benefits.

Employment	Benefit details	Benefit Amount

Please enclose P60 and/or P45 for every employment in the year ended 5 April 2011 with any P11D's received.

4.2 Did you receive any **pensions or social security benefits** (other than tax credits) during the year ended 5 April 2011?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes give details below **and enclose form P60** from the pension provider or documentation from the benefits office:-

Description of Income	Name & Address of Pension Provider/ Benefits Office	Income Received (£)	
		Gross	Tax
	As Applicable		

'✓' as Appropriate

4.3 Have you any other income sources or involvements in any other businesses not referred to above?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If so, please give brief details in the space below:-

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5 PERSONAL ALLOWANCES

5.1 Married Couples Allowance.

Enter your date of birth. (dd/mm/yyyy).

Enter your spouses date of birth (dd/mm/yyyy).

Full Name of Spouse			
Date of Marriage (dd/mm/yyyy)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maiden Name (if appropriate)			

5.2 Are you liable to make Student Loan Repayments for 2010/11 on an Income Contingent Student Loan?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

Tick the 'yes' box if the Student Loan Company notified you that the repayment of your Income Contingent Student Loan commenced during the year to 5 April 2011 and you have not received confirmation from them that the loan has been repaid in full.

Amount of student loan outstanding £_____

Please provide a recent statement from the Student Loan Company

6 QUALIFYING LOANS

'✓' as Appropriate

6.1 Have you any outstanding loans for funds raised to invest in a partnership or limited company (other than loans already included in your business accounts)?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes give details below:-

Purpose of Loan	Name of Lender	Interest Paid (06/04/10-05/04/11)

Certificates from your lender are required in support of any claims for interest relief.

7 PERSONAL PENSION / RETIREMENT ANNUITIES

7.1 Did you make any payments to a personal pension, retirement annuity or AVC?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

If yes give details below:-

* **Note: Enter the total payments you have made in the tax year on each policy**

Name of Pension Provider	Contract/Membership No & Type of Policy	Premiums Paid (Net) (06/04/10-05/04/11)

8. If you have made any Gift Aid Payments or other Annual Payments after basic rate tax (i.e. Subscriptions for Venture Capital Trust, Enterprise Investment Scheme etc) please provide details below:

If there is any other information you consider relevant to assisting us to complete your tax return please give details below:

9. If you are entitled to a repayment of tax do you want to nominate a charity to receive all or part of your repayment?

 YES NO

If yes do you want the charity to receive all of your repayment?

 YES NO

If no please state the amount you wish to nominate.

Do you wish Gift Aid to apply?

 YES NO

Do you wish to remain anonymous?

 YES NO

Please state your chosen charity.