

.....  
**TAX RETURN QUESTIONNAIRE**



Dear Client,

Please mark any questions not relevant, and then complete **all** the remaining, attaching any relevant paper work and giving full details on the back of these forms where necessary.

*Please remember that these questions relate from 6 April of one year to 5 April of the next.*

**Matt Austin**

Not Relevant

[Paperwork  
enclosed]

Details

**Income**

1. Give details of gross wages, net income and tax deducted from any employment, i.e. P60, P45, CIS25 taxed deducted 20% etc.

N/A

[Yes] [No]

*Please attach certificate(s).*

2. Give details of any self-employment income, *other than income that will be shown on F.A.S.'s Annual Accounts.*

N/A

[Yes] [No]

3. Give details of all bank and building society interest received and tax deducted.

N/A

[Yes] [No]

*Please attach relevant certificate(s).*

*Please advise where joint accounts.*

4. **a** Give details of any shares bought or sold.

N/A

4.**b** Attach all dividend vouchers, or give details of dividends received and notional tax deducted for shares.

N/A

[Yes] [No]

*Please attach relevant certificate(s).*

*Please advise where shares are jointly owned.*

5. Give complete details of pension / benefit received:

Total **received**;

Tax paid;

Current weekly rate;

Weekly rates prior to 5 April this year if different.

N/A

[Yes] [No]

*Please attach relevant certificate(s) and/or letters*

6. Give details of any other income received, *i.e. rent received, life insurance, gifts, benefits allowances, trusts, will beneficiary, foreign income, etc.*

N/A

[Yes] [No]

.....  
**TAX RETURN QUESTIONNAIRE**



**Expenses and allowances**

---

7. Give details of all retirement annuity and/or personal pension premiums paid.

N/A

---

---

---

---

**Most premiums now have tax relief on payment** [Yes] [No]

*Please attach the form PPCC, Personal Pension Contribution Certificate, which should have been recently sent to you or details disclosed in the form of a letter from your pension provide*

---

8. Give details of any business loan interest paid, and details of any new loans taken out or terminated this financial year.

N/A

[Yes] [No]

---

---

---

*Please attach relevant certificate(s) and confirm/advise reason for loan.*

---

9. Give full details of all maintenance payments made.

N/A

[Yes] [No]

---

---

---

---

**Only available if you are over 65.**

*Please attach the court order or the DSS letter as without one of these, F.A.S. is unable to claim any tax relief due.*

---

10. Give details of any other taxable expenses incurred, subscriptions, or relief due.

N/A

[Yes] [No]

---

---

---

*Please attach relevant paper work and give full details on the back of this form.*

---

**Other**

---

11. Any changes in your circumstance which might affect your entitlement to allowance.

N/A

[Yes] [No]

---

---

12. Any property bought or sold other than main residence

N/A

[Yes] [No]

---

---

---

*Please attach relevant paperwork.*

*If joint owned accounts please note.*

---

..... **Signed** ..... **Dated**

---