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TAX RETURN QUESTIONNAIRE



Dear Client,

Please mark any questions not relevant, [N/A], 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 Applicable

[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. *AND attach certificate(s).*

N/A
[Yes] [No]

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.
Attach relevant certificate(s) AND advise where joint accounts.

N/A
[Yes] [No]

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.
Attach relevant certificate(s) AND advise where joint accounts.

N/A
[Yes] [No]

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.
Attach relevant certificate(s) and/or letters

N/A
[Yes] [No]

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]

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]

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]

Attach relevant certificate(s) and confirm/advise reason for loan.

9. Give full details of all maintenance payments made.

N/A

Only available if you are over 65.

[Yes] [No]

Attach the court order or the DSS letter. F.A.S. is unable to claim any tax relief due as without.

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

N/A

[Yes] [No]

Attach relevant paper work and give full details on the back of 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]

Attach relevant certificate(s) AND advise where joint accounts.

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

Bank Statements

You need to forward bank statements, which cover this Return's period, along with any completed bookkeeping. (If you have outstanding bookkeeping, still forward paperwork and FAS will charge £25 per hour to complete.)

Although the Government prefers PDFs, FAS prefers CSVs but can use either. If you are unable to download the PDFs / CSVs from the bank's websites, but have the original bank / credit card statements, scan and email /WhatsApp them.

FAS has also been granted "Third Party" authority to access banking transactions, read-only access only, through specialised accounting software like QuickBooks. Contact me if this is of interest.

Finally, once received, I will complete / review bookkeeping and start compiling your business's DRAFT Annual Accounts prior to populating / converting and tagging them to your business's Tax Return.
