

## Tax Return Questionnaire

## Tax year 2019/20

(Covering the period from 6 April 2019 to 5 April 2020)

## **Please read this in full**

You are responsible for providing complete and accurate information to enable us to complete this Return and should not assume that we hold any relevant information. Should it be necessary we may request further information or seek explanations in connection with information supplied to us and it is your responsibility to comply with such requests.

The legal responsibility for submitting a Tax Return, and its accuracy and completeness, rests solely with you as the taxpayer. Whilst you may delegate the compilation of the Return and the calculation of any liabilities to A1 AccounTax, your responsibility for that Return and for the payment of all tax liabilities, penalties and interest that may result remains your own.

HM Revenue & Customs will no longer accept paper copies of Tax Returns other than the original Tax Return they issued to you for completion (or a copy downloaded from their website).

For this reason we propose to submit your Tax Return online, once you have agreed, signed and sent back to us the paper, computer-generated copy we will send to you. **If, for any reason, you do not want us to make an online submission, you must let us know in writing or by email as soon as possible.**

## **Important dates**

Online submission of your Tax Return must be completed by **31 January 2021**. Late submission will result in an automatic penalty of up to £1,200. **If you wish, instead, to submit a paper copy it must reach HM Revenue & Customs by 31 October 2020.**

Please note that final tax liabilities for 2019/20 and part payment on account for 2020/21 are both due for payment on 31 January 2021. You should therefore consider the cash flow implications of making these payments. Interest and possibly surcharges accrue on late payment of these liabilities.

## **Instructions for completion of this questionnaire**

So that we can complete your Tax Return quickly and efficiently please make sure you work through each of the questions on this questionnaire systematically. The very nature of personal tax means that there are a lot of questions; this is a necessary evil to avoid providing us with incomplete or inaccurate information.

You should not make the mistake of assuming that any information is already held by us, nor that we already know the answer to any question. Duplication in this case is a whole lot better than omitting something important.

Where this is the first time A1 AccounTax have completed a Tax Return for you, you should send any of the following details:

1. Any original Tax Return issued to you
2. Any Notice of Tax Code received for the tax years ending 5 April 2019 and 2020.
3. Any statement of account issued by the Collector of Taxes
4. Details of any payments on account made for the tax year ended 5 April 2020 (Payments made on 31 January and 31 July 2019)

It would be helpful if all other clients also submit, with this questionnaire, items 2 and 3 above.

We may need further information as a result of the particular answers given or the information provided. If so we will request that information from you. You should respond as quickly as possible to any such request.

If you have any questions relating to this questionnaire then please do not hesitate to contact us.

If you believe that any person connected to you may need to complete a Tax Return you should contact us to see whether or not the completion of their Return is part of our normal service. Where their Return is not part of the usual service we would be happy to provide a fixed fee quote for its completion.

**1. PERSONAL DETAILS**

|  |  |
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| Full name |  |
| **National Insurance number (if known)** |  |
| **UTR Number (if known)** |  |
| **Date questionnaire completed** |  |
| **Date questionnaire received by A1 AccounTax** | **For internal use only** |

**2. EMPLOYMENT DETAILS**

NOTE: You do not need to supply any information regarding employment with your own company provided A1 AccounTax has acted for that company throughout the tax year ended 5 April 2020. If that is not the case please complete the questions below where appropriate.

If you have been employed by any other company please provide all of the following information:

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| Employment details | **Employment 1** | **Employment 2** | **Employment 3** |
| Employer’s name |  |  |  |
| Income from this employment was subject to IR35 | Yes / No | Yes / No | Yes / No |
| Date employment commenced if AFTER 5 April 2019 |  |  |  |
| Date employment ceased if BEFORE 6 April 2020 |  |  |  |
| Attach form P45 or P60 or final pay slip – anything that shows final gross pay and income tax deducted |  |  |  |
| Attach form P11D Benefits and expenses for each employment, unless already sent |  |  |  |
| Please insert the employer’s tax reference |  |  |  |
| Provide any further comments concerning this employment which you consider may be helpful to us |  |  |  |

**3. INTEREST FROM BANKS, BUILDING SOCIETIES AND OTHER SAVINGS**

NOTE: Your account statements will state whether interest was paid NET or GROSS. If the account is held jointly with another person please ONLY give details of your share of interest received.

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| 3.1 UK Banks, Building societies or other savings where interest is received NET of tax | | | |
| **Account held with** | Account number | **NET interest received** | Tax deducted at source |
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| 3.2 UK Banks, Building societies or other savings where interest is received GROSS | | | |
| **Account held with** | **Account number** | **GROSS interest received** |  |
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| 3.3 Foreign Banks, Building societies or other savings where interest is received NET of overseas tax | | | | | |
| **Name of bank etc** | **Country** | | **Account number** | **NET interest received** | Foreign Tax deducted at source |
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| 3.4 Foreign Banks, Building societies or other savings where interest is received GROSS | | | | | |
| **Name of bank etc** | | **Country** | | **Account number** | **Gross interest received** |
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**4. DIVIDEND INCOME**

NOTE: Where shares are held jointly with another person please ONLY give details of your share of the dividend

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| 4.1 Dividends received from YOUR CompanyYou do not need to complete this section if: 1 A1 AccounTax have acted for your company throughout the tax year ended 5 April 2020  **AND**  2 You have submitted all of your accounting information to at least 30 April 2020 | | | |
| **Your company name** | **Number of shares held** | **Class of share** | NET Dividend |
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| 4.2 Other UK company dividends or unit trusts | | | | |
| **Company name** | | **Number and class of shares held** | **NET dividend** | Tax credit |
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| 4.3 Foreign company dividends received | | | | |
| **Company name** | **Country** | **Number and class of shares** | **NET dividend** | Foreign Tax credit |
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| 5.1 Pensions received by you from previous employments | | | | |
| **Pension company name** | **Pension scheme number** | | **Gross pension** | Tax deducted |
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| 6.1 State benefits received (including Jobseeker’s Allowance) | | | | |
| **Benefit type** | | **Gross amount** | **Tax deducted at source** | Net benefit received |
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| 7.1 PERSONAL Pension contributions and retirement premiums **Do NOT include premiums paid by your company or any other employer** | | | | | | | |
|  | **Policy 1** | | | **Policy 2** | | Policy 3 | |
| Pension company |  | | |  | |  | |
| Pension policy type |  | | |  | |  | |
| Policy number |  | | |  | |  | |
| Contributions **paid NET** |  | | |  | |  | |
| 8.1 Gains, profits or losses on the sale of personal assets (excluding main residence) | | | | | | | |
| **Disposal of assets** | **Purchased** | | **Sold** | | | | Notes |
| **Asset name** | **Date** | **Cost** | **Date** | | **Proceeds** | |
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| 9.1 Property rental income | | | | | |
| Did you let part of your main residence under the rent a room rules? | | | | | Yes / No |
| If so did the total income exceed £4,250? | | Yes / No | Do you share this income with others? | | Yes / No |
| **Other rental income** | Property address | | Property address | Property address | |
|  | |  |  | |
| Rental income received |  | |  |  | |
| Less Expenses as below: | | | | | |
| Interest paid (not capital) on borrowings |  | |  |  | |
| Agency fees |  | |  |  | |
| Other professional fees |  | |  |  | |
| Maintenance and repairs |  | |  |  | |
| Insurances |  | |  |  | |
| Ground rents and rates |  | |  |  | |
| Other expenses – please list |  | |  |  | |
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| Is this income split with another person? | Yes / No | | Yes / No | Yes / No | |

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| 10.1 Do you make any charitable donations under gift aid or deed of covenant? – Please detail below | | | | | |
| **Charity** | | | | | **Amount** |
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| **10.2 PERSONAL loans to purchase assets used in the business. *Do not include loans on your main residence*.** | | | | | |
| Asset description | Original cost | Interest paid in period | Notes | | Claim CA’s |
|  |  |  |  | | Yes / No |
|  |  |  |  | | Yes / No |
|  |  |  |  | | Yes / No |
| 10.3 Are you due to make repayments of an Income Contingent Student Loan? | | | | Yes/No | |
| Please enter the amount or repayments made | | | |  | |

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| 11.1 Did you or your partner receive Child Benefit ? | Yes/No |
| Amount of Child Benefit received from 6 April 2019 to 5 April 2020 |  |
| Number of children for whom you and your partner received Child Benefit |  |
| Was your income higher than that of your partner? | Yes/No |