

UK Tax return questionnaire for UK nationals who are working overseas or have just returned to the UK

**1 General Information about yourself**

**Name**

**Address**

  
  
  

**National Insurance number**

**Date of birth**

**Spouse's name and date of marriage**

**Date of departure from UK**

**If you returned to the UK in 2005/06, please provide your date of return**

**How many days did you spend in the UK during 2005/06 while you were not resident (excluding days of arrival and departure)**

**Tax district reference and self assessment number**

(This information can be found on the first page of the tax return form sent to you by the Inland Revenue, if you have this please send us a copy of page 1 of the form)

**Please send us a copy of:**

- Your most recent tax coding for 2005/06
- Your most recent statement of account from the Inland Revenue

**Telephone number where we can contact you**

**E-mail address for contacting you**

## Employment Income

### 2 General Information about your employment income

If 2005/06 was the year of your departure from or return to the UK, please provide us with:

- a) A copy of your P60 or P45 from your employer
- b) A copy of your P11D from your employer
- c) If you left an employment, part of the way through the tax year, please provide us with a copy of your P45 and P11D from your previous employer, together with a) and b) above

### 3 Other Information about your employment income

**3a)** Did you receive a redundancy or severance payment from an employer in 2005/06?

*If, yes, please provide us with a copy of the agreement between you and your employer regarding the payment and your final payslips showing the payment*

**Yes** Please provide us with details opposite

**No** Go to 3b)

**3b)** Did you receive a bonus in 2005/06 after leaving the UK that related in part to duties performed in the UK prior to your departure?

**Yes** Please let us know the amount of the bonus, date of payment, period to which the bonus relates and whether tax was deducted from it - please provide a copy of the relevant payslip

**No** Go to 3c)

**3c)** Did you receive a bonus in 2005/06 after returning to the UK that related in part to duties performed outside the UK prior to your arrival?

**Yes** Please let us know the amount of the bonus, date of payment, period to which the bonus relates and whether tax was deducted from it - please provide a copy of the relevant payslip

**No** Go to 3d)

**3d)** Did you receive an award of share options in 2005/06?

**Yes** Please provide details below

**No** Go to 3e)

## Employment Income

### 3 Other Information about your employment income (continued)

**3e)** Did you exercise any share options in 2005/06?

**Yes** Please provide details below

**No** Go to 3f)

Date of grant

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Date of exercise

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Number of shares

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Market value at exercise

--

Grant price

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Details of any subsequent disposal of shares

--

Details of PAYE paid

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Was the income and PAYE included in your P60?

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**3f)** Did you receive any other income from equity incentive awards, such as stock purchase awards and restricted shares?

**Yes** Please provide details below

**No** Go to 3f)

**3g)** Did you continue to pay contributions into an employer UK pension plan after leaving

**Yes** Please provide details below

**No** Go to 3g)

**3g)** Do you pay contributions into a Free-standing AVC plan or a personal pension plan?

**Yes** Please provide details below

**No** Go to 4

## Investment Income

### 4 General Information about your employment income

**Important for Questions 4a), b) and c) and d) we will only need details of income from UK sources for full years of non residence. If 2005/06 was the year of your departure or arrival in the UK we will need details of your worldwide investment income for the period up to your departure from the UK or arrival in the UK.**

**4a)** Do you have any income from property

**Yes** Please provide information set out below

**No** Go to 4b)

The address of the property(ies)

  

Rental income received 2005/06

Mortgage interest paid

Agent's fees

Insurance

Service charges

Other expenses

Is the property let furnished or unfurnished?

**4b)** Do you receive interest income?

**Yes** If yes, please provide the details of the gross interest, tax deducted from your share of any interest income

**No** Go to 4c)

**4c)** Do you receive dividend income?

**Yes** If yes, please provide the name of the payer, the number of shares you own, net dividends received

**No** Go to 4d)

## Investment Income

### 4 General Information about your employment income (continued)

4d) Do you have any income from overseas sources

**Yes** Please provide details

**No** Go to 4e)

#### Capital Transactions

4e(i) Have you disposed of any chargeable assets

**Yes** Please provide contract notes or details (dates and costs or proceeds) of transactions

**No** Go to 4e(ii)

4e(ii) Is this your year of departure from the UK and have you been resident here for at least part of 4 of the previous 7 tax years?

**Yes**

**No** Go to 4e(iii)

4e(iii) Is this your year of arrival in the UK having been resident here in any of the previous 5 years tax years?

**Yes** You will need to provide all the details requested in 4e(i) for all disposals of assets in years of non residence owned prior to your leaving the UK.

**No** Go to 5

## Reliefs and Other Information

### 5 Information about reliefs and gifts to charity

5a) Have you subscribed for Enterprise Investment Scheme or Venture Capital Trust shares?

**Yes** Please provide a copy of the certificate given to you when you subscribed for the shares

**No** Go to 5b)

5b) Have you made payments to charitable bodies under the following:

- Gift Aid
- Deed of covenant
- Qualifying investments in shares and security and real property

**Yes** Please provide a copy of any relevant documentation to support a claim for relief

**No** Go to 6

### 6 Other information

This questionnaire is designed to cover most situations. However it does not include all possible sources of income and claims for relief. If you have received any other income not mentioned above which you believe may be liable to tax, please provide us with the details. If you believe relief is due on other outgoings, please also provide us with additional information.

**Signed**

**Dated**

Stephen Asher Consulting is registered under the Data Protection Act for holding personal data and will ensure that information that you send to us is handled in accordance with that Act.