

UK Tax return questionnaire for employed UK domiciled and ordinarily resident individuals

1 General Information about yourself

Name

Address

National Insurance number

Date of birth

Spouse's name and date of marriage

Children's name/s and date/s of birth

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

Please provide us with:

- a) A copy of your P60 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 an award of share options in 2005/06?

Yes Please provide details

No Go to 3c)

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

Yes Please provide details below

No Go to 3d)

Date of grant

Date of exercise

Number of shares

Market value at exercise

Grant price

Details of any subsequent disposal of shares

Details of PAYE paid

Was the income and PAYE included in your P60?

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

Yes Please provide details

No Go to 3e)

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

Yes Please provide details

No Go to 4

Investment Income

4 General Information about your employment income

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)

4d) Do you have any income from overseas sources

Yes Please provide details

No Go to 4e)

4e) Have you disposed of any chargeable assets

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

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.