

## Self-Assessment Questionnaire

For us to help file your Self-Assessment Return, please complete this form, and where applicable, provide the supplementary information.

Helpful notes about your Self-Assessment Tax Return

- ✓ A Self-Assessment tax return declares all your income for the tax year, including income that has already been taxed at source. If you have paid too much tax during the year, you're likely to receive a rebate.
- ✓ The tax year for every individual in the UK runs from 6th of April to the 5th of April the following year
- ✓ A Self-Assessment tax return is separate to a company tax return.
- ✓ A Unique Tax Reference (UTR) is your personal reference that: Identifies you in your personal capacity at HMRC
- ✓ If you do not have a UTR number, you will need to register for one at HMRC. With your permission we can complete the registration for you. For help on how to do this or other UTR questions please contact us.

### Section A: Personal Details

Title (Mr., Mrs., Miss etc.)	
First Name /Middle Names:	
Last Name:	
Date of Birth:	
Address:	
Contact Number:	
Email:	
NI Number:	
Unique Tax Reference (UTR) number (see notes):	
Limited Company name (if applicable):	

***Please send copies (not originals) of any correspondence received from HMRC.***

## Section B: Income & Employment

Salary

1. Were you employed in the UK Yes  No

Please List your Employers names and dates you were employed during this tax year (continue a separate sheet if necessary) If you were paid via an Umbrella Company or a Limited Company you put this instead of the customer/contract name.

	Employer Name	Start date dd/mm/yyyy	End date dd/mm/yyyy
Employer No. 1			
Employer No. 2			
Employer No. 3			

For each employment we require:

**P60** This shows salary and tax deducted for the tax year OR

**P45** If you have left employment during the tax year AND

**P11D** This is if you have received any Benefits-in-Kind, e.g. private health expenses, company car – this may not have been issued by your employer until 06 July – if so, you should complete your tax return after you receive it.

### Taxable Benefits

2. Did you receive taxable benefits (such as Job Seekers allowance or ESA) in the UK Yes  No

Please List your Benefit names and dates you were receiving this income during this tax year (continue on a separate sheet if necessary)

	Benefit Name	Start date (dd/mm/yyyy)	Start date (dd/mm/yyyy)
Benefit No. 1			
Benefit No. 2			

For each taxable benefit we require:

**P60** This shows gross income and tax deducted (although usually £0 tax deducted) for the tax year OR

**P45** If you have left the benefit during the tax year

### Private Pension Income

3. Did you receive income from a Private Pension in the UK Yes  No

Please List your Benefit names and dates you were receiving this income during this tax year (continue a separate sheet if necessary)

	Pension Name	Start date (dd/mm/yyyy)	Start date (dd/mm/yyyy)
Pension No. 1			
Pension No. 2			

For each pension you receive we require:

**P60** This shows gross income and tax deducted for the tax year OR

**P45** If you have left/cancelled the pension during the tax

**Dividends from Shares**

*(excluding your personal Limited Company)*

4. Did you receive any Dividends from shares Yes  No

If yes, please attach a copy of any Dividend Certificate/s for Dividends you have received, or alternatively advise the Net Dividend amount you have received and the Name of the Company.

Company Dividend is from: \_\_\_\_\_

Amount £: \_\_\_\_\_

**Limited Company Salary & Dividends**

5. Did you have a Limited Company Yes  No

If Yes, we will require for each Limited Company:

- ✓ A copy of the P60/P45/P11D
- ✓ Copies of Dividends Certificates

Please List the Name/s of the Limited Company and dates you were employed during this tax year (Continue on a separate sheet if necessary):

	Limited company Name	Start date	End date
Ltd Company 1			
Ltd Company 2			

**Self Employed/Sole Trader**

*(If you contract through a Limited Company or paid by an umbrella company, you ARE NOT Self-Employed/Sole Trader)*

6. Were you Self Employed at any time during the tax year Yes  No

If Yes, we will require the following:

- ✓ Business Description
- ✓ Income/invoices
- ✓ Expenses
- ✓ **++Construction Industry Scheme (CIS)**

7. Did you receive income from CIS Yes  No

If Yes, we will require a list of your:

- ✓ CIS payments (showing the CIS amounts less the tax deductions)
- ✓ Expenses

**Section C: Other Income**

**Personal Bank Interest / Savings Account Interest**

8. Did you receive interest from personal bank accounts held individually and/or jointly across the tax year? This includes gross interest and/or net interest received (after tax).

*\*Please note personal ISA's are exempt from tax.*

Yes  No

If Yes, please attach a copy of the Statement of Interest detailing Account details, Gross interest, tax withheld (if any) and Net interest.

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Phone: 02032391207, email: info@pillarledgers.com

### Private Pension Contributions

A Personal Pension is an independent pension arrangement made between an individual and a pension provider, e.g. an insurance company, bank or employer.

9. Did you make contributions to a Private Pension Scheme? Yes  No

If Yes, please provide full details of the Pension Scheme and of any payments made. You may have received a statement from the pension provider with these details.

### Capital Gains

Capital Gains will arise on any disposal (sale) of assets in a given tax year. The sale of the following assets may give rise to a Capital Gain: Investments (shares), Land & Buildings, Antiques and/or Jewellery.

10. Did you dispose of (sell) any such assets during the year? Yes  No

If Yes, please provide purchase and disposal details including asset type, buy/sell amounts, buy/sell dates and where relevant quantities.

### Rental Income

11. Did you have a rental property at any time during the tax year? Yes  No

If Yes, we require the details of rents received and expenses paid including details of any mortgage interest paid. You may only claim property related expenses that you have paid (not expenses that tenants have paid) and relating to the period that the property was rented or on the market to be rented (not expenses paid when the property was not available for rent).

12. Was the property furnished? Yes  No

### Other Income

13. Have you received any other UK income not listed above? Yes  No

e.g. State Pension

If Yes, please provide details:

## Section D: Student Loan & Child Benefit

### Student Loans

14. Are you liable to make student loan repayments based on your earnings? Yes  No

(If you have answered yes to the above, we will require evidence of any payments you have made between during the tax year)

*A statement of payments will be available from the Student Loans Company. Or they can give you the total figure over the phone).*

### Child Benefit

15. Do you have individual gross income of more than £50,000 per annum, and either of you or your partner receives Child Benefit contributions towards the upkeep of a child? Yes  No

16. Does your partner have individual gross income of more than £50,000 per annum, and either of you or your partner receives Child Benefit contributions towards the upkeep of a child? Yes  No

(Read more about this new charge at <http://www.hmrc.gov.uk/childbenefitcharge/introduction.htm>)

**Other Deductions**

17. Do you have any other allowable deductions, such as gift aid, that have not already been mentioned? Do not include items that have already been recorded as a company expense. Yes  No

If yes, please provide details:

**Section E: Residency Status & Overseas Income**

18. Were you born in the UK, or, are you domiciled in the UK? (i.e. do you intend to live in the UK for the foreseeable future) Yes  No

If No, please state the date that you arrived in the UK (the date you came here to live) and then proceed to Question 19.

Arrival date: \_\_\_/\_\_\_/\_\_\_\_\_

19. Did you have any income outside of the UK from 6 April to 5 April of the tax year? Yes  No   
If Yes, please proceed to Question 20.

If No, go to Section F.

20. Does your income outside of the UK exceed £2,000? Yes  No

Please provide details of this income in the table below

(Note that you are not required to answer Question 21).

Type of income (e.g Salary, Dividends, Rental etc.)	Amount of the income	Taxes paid/withheld on the income	Country in which the income arose	Was the income brought into the UK?

21. Did you bring any of this income into the UK? Yes  No

If Yes, please provide details of this income in the table below.

Type of income (e.g Salary, Dividends, Rental etc.)	Amount of the income	Taxes paid/withheld on the income	Country in which the income arose	Was the income brought into the UK?

**Section F: Tax Refund & Declaration**

Payments on Account:

22. Did you make any payments on account for your tax return for the previous tax year? Yes  No

If you have answered yes, please provide evidence of the payments made to HMRC.

Payment on Account 1 (Due January): £ \_\_\_\_\_ Payment on Account 2 (Due July ): £ \_\_\_\_\_

23. Have HMRC paid you any PAYE refunds during the tax year?

(If you have answered yes please provide the letter and calculation) Yes  No

24. Should you be eligible for a tax refund; how would you like it to be paid? Electronic payment to  A cheque posted to you   
To your account

If you would like the refund deposited directly into your UK Bank Account or into a Nominee's UK Bank Account, please tick the correct box:

Your UK Bank Account  Nominee's UK Bank Account

Bank Name:	
UK Bank Sort Code:	
UK Bank Account Number:	
Account Holders Name:	

***Is there any further information or questions that you would like to be taken into consideration?***

**Declaration**

I hereby declare that the information provided by myself to be complete and accurate. I authorised Pillar Ledgers in their capacity as my authorised tax agents, to proceed with the preparation, calculation and electronic or manual submission of my Personal Tax Return based on the information provided in this questionnaire.

Please sign and print your name below.

Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_

Date (DD/MM/YYYY): \_\_\_\_\_