

# 2024 Tax Return Questionnaire

Client No:

Date Issued:

Client Name:

Date Returned:

*Please complete and return the questionnaire by 31 July 2024.  
Thank you from the Tax Team!*



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## Personal and Correspondence Details

1. Please complete the following:
  - 1.1. Full Name \_\_\_\_\_
  - 1.2. Email Address \_\_\_\_\_
  - 1.3. Marital status - please circle one of the following: ( Single / Married / Registered Civil Partnership / Separated / Divorced / Widowed )
2. How would you like us to provide your Tax Return to you for approval?  
Please choose **one** of the following:
 

In digital format - for you to electronically sign on Onvio	<input checked="" type="checkbox"/>
In the post - for you to sign and return	<input type="checkbox"/>
3. Would you like your Tax Return Questionnaire to be emailed to you next year?  
If you answer 'no' to this question, the questionnaire will be posted to you. **Yes / No**
4. If your Tax Return shows that you are due a tax repayment, would you like this to be paid by HMRC directly to your bank or building society account? **Yes / No**  
If yes, please provide the following details:
 

Name of Bank or Building Society	_____
Name of Account Holder as it appears on the account	_____
Branch Sort Code	_____
Account Number	_____
Building Society Reference Number	_____

*continued.....*

**PLEASE RETURN BY 31 JULY 2024**

## Earned Income

### Self-Employed Income (from unincorporated business)

5. Were you self-employed for any period during the year ended 5 April 2024?  
(either as a sole trader or a partner of a partnership or LLP)  
- If **Yes**, please answer the following: **Yes / No**
6. Have we had your accounting records already? **Yes / No**  
  
- If **No**, when will you supply your records to us? \_\_\_\_\_  
  
What is the nature of your business? \_\_\_\_\_
7. Are you prepared for the commencement of Making Tax Digital for Income Tax  
that will apply to sole traders with business income above £50,000 from 6 April 2026? **Yes / No / NA**  
  
- If **No**, we will contact you to discuss this further if your turnover is over £50,000.

### Employed Income

8. Were you employed for any period during the year ended 5 April 2024? **Yes / No**  
  
- If **Yes**, please provide the following:  
- Form(s) P60 providing your pay and tax details for the year\*  
- Form(s) P45 if you have left any employment in the year\*  
(\* unless we prepare payroll for the company).  
- PAYE coding notices for 2023/24 and 2024/25.
- Please also answer the following:
- 8.1. What is your occupation? \_\_\_\_\_
- 8.2. How many employments/directorships did you hold in the year? \_\_\_\_\_
- 8.3. If you commenced an employment after 5 April 2023, what date did you start? \_\_\_\_\_
- 8.4. Did you receive any taxable benefits in kind from your employment? **Yes / No**  
- If **Yes**, please provide your form P11D, unless we prepare these for the company.
- 8.5. Has your employer required you to work from home throughout the year during  
the year ended 5 April 2024? **Yes / No**  
  
To claim the tax relief for working from home, one of the following rules must  
also apply-;  
  
- there are no appropriate facilities available for you to perform your job on your  
employer's premises  
  
- your job requires you to travel an unreasonable distance to your employer's  
premises daily
- If they have, has your employer paid you an allowance for working from home? **Yes / No**  
  
- If **Yes**, please provide details of the amount you have been paid. \_\_\_\_\_

*continued.....*

**PLEASE RETURN BY 31 JULY 2024**

- 8.6. Did you receive any of the following from your employment, during the year ended 5 April 2024:
- Any other expenses in relation to your employment which your employer has not reimbursed? **Yes / No**
  - Tips or other untaxed income? **Yes / No**
  - Lump sum or compensation payments? **Yes / No**
  - Employee Share Options? **Yes / No**
  - Income or share related benefits from an employee share option scheme? **Yes / No**
  - If **Yes**, please provide details and any supporting documentation.

9. Are you entitled to claim any fixed sum or flat rate allowances in respect of your employment? **Yes / No**

- If yes, please provide details. You may wish to refer to HMRC's guidance at <https://www.gov.uk/hmrc-internal-manuals/employment-income-manual/eim32712>

10. Did you work abroad during the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please provide dates of periods spent abroad and earnings.

### Social Security Benefits

11. Did you receive any unemployment or social security benefits in the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please supply the P60 if applicable and give details below.

<u>Name of Benefit</u>	<u>Name of Benefit Office</u>	<u>Amount Received</u>
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### Pension Income

12. Did you receive a **State Pension** during the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please provide details of the amounts actually received together with the letter from The Pension Service confirming your weekly rate.
13. Did you receive any **other pensions** during the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please give details and provide the relevant P60s.
14. Have you started to receive a new pension or social security benefit after 5 April 2024? **Yes / No**  
- If **Yes**, please provide details.

## Savings and Investment Income and Gains

### Property Income and Capital Gains

15. Did you receive **rental income** from any of the following sources during the year ended 5 April 2024?
- |   |                 |
|---|-----------------|
| Residential property lettings                               | <b>Yes / No</b> |
| Commercial property lettings                                | <b>Yes / No</b> |
| Furnished holiday lettings or serviced accommodation        | <b>Yes / No</b> |
| Ground rents or feu duties                                  | <b>Yes / No</b> |
| Land  | <b>Yes / No</b> |
| Property abroad   | <b>Yes / No</b> |
| A room in your only or main residence ("Rent a room")       | <b>Yes / No</b> |
| <b>Only</b> indirectly via own company, LLP or partnership? | <b>Yes / No</b> |
- If **Yes**, have we had your accounting records already? **Yes / No**
- If **No**, when will you supply your records to us? \_\_\_\_\_

If required, bookkeeping schedules for the year ended 5 April 2024 have been stored on Onvio for you. Please contact us if you have any queries.

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**PLEASE RETURN BY 31 JULY 2024**

16. Are you prepared for the commencement of Making Tax Digital for Income tax (not Corporation Tax) that will apply to landlords with a gross income over £50,000 from 6 April 2026?  
- If **No**, we will contact you to discuss this further if your gross income is over £50,000. **Yes / No / NA**
17. Did you buy, sell or otherwise change your **Principle Private Residence** during the year ended 5 April 2024?  
- If **Yes**, please provide further details **Yes / No**
18. Have you purchased or acquired any other property during the year ended 5 April 2024?  
- If **Yes**, please provide details and a copy of the completion statement. **Yes / No**
19. Have you sold or disposed of any other property during the year ended 5 April 2024?  
- If **Yes**, please provide details and a copy of the completion statement. **Yes / No**

**You are required to report and pay Capital Gains Tax on UK residential property to HM Revenue & Customs within 60 days of completion. These disposals must also be reported on your Self Assessment Tax Return for the year in which exchange of contracts took place. If we did not deal with reporting the gain to HM Revenue & Customs, please provide us with details of the reported gain and the capital gains tax payment on account made.**

### **Savings and Investment Income and Capital Gains**

20. Do you have a **UK Bank Account or Building Society Account** (excluding ISAs)?  
- If **Yes**, did you receive any interest from these accounts in the year ended 5 April 2024? (Including any account you closed during the year)  
- If **Yes**, please provide interest certificates. **ALL INTEREST MUST BE DISCLOSED.** **Yes / No**
21. Do you have any **money invested** in any of the following:  
NS&I (excluding Premium Bonds)? **Yes / No**  
Government Stocks, War Loans or other fixed interest stocks? **Yes / No**  
Certificates of tax deposit? **Yes / No**  
Loans to private individuals or organisations? **Yes / No**  
Credit Unions or Friendly Societies? **Yes / No**  
- If **Yes**, please provide all tax certificates or further information.
22. Have you received any communications from HMRC in respect of excess subscriptions to an ISA?  
- If **Yes**, please provide details. **Yes / No**
23. Did you receive any **dividends** or **interest** from UK Companies or Unit Trusts?  
- If **Yes**, please attach all tax certificates. **Yes / No**
24. Did you receive any shares in place of a cash dividend?  
- If **Yes**, please attach the relevant documentation **Yes / No**
25. Did you have any Cryptocurrency investments during the year ended 5 April 2024?  
- If **Yes**, we will contact you for further information **Yes / No**
26. Did you buy or sell any stocks and shares during the year ended 5 April 2024?  
- If **Yes**, please provide the contract notes. **Yes / No**
- In order that we can consider the “matching rules” for share disposals, please also provide details of all stocks and shares acquired during the period 6 April 2024 to 5 May 2024.**
27. Have you sold or disposed of any other assets during the year ended 5 April 2024?  
- If **Yes**, please provide details. **Yes / No**

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28. Did you receive any income from **savings or investments abroad** in the year? **Yes / No**  
- If **Yes**, please provide interest certificates, dividend vouchers and any other details.  
[Please note that if you are domiciled outside of the UK, we do need you to provide full details of your overseas income and gains so that we may consider whether or not you are affected by the rules for the remittance basis of taxation.]
29. Did you receive any **gains** on life assurance policies or investment bonds in the year? **Yes / No**  
- If **Yes**, please supply the chargeable event certificates and original date(s) of investment.
30. Have you received or are you entitled to receive any income (not capital distribution) from any **Trusts or Settlements** for the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please attach all tax certificates.
31. Have you received any income (not capital distribution) from the **Estate of a deceased person** in the year ended 5 April 2024? **Yes / No**  
- If **Yes**, please attach all tax certificates

## Outgoings

32. Were any pension contributions made by you or made on your behalf (by your employer or someone else) during the year ended 5 April 2024? **Yes / No**  
- If **Yes** were these:
- Personal contributions made by you directly, for example, by direct debit or cheque payment from your bank account? **Yes / No**
  - By deduction from your salary? **Yes / No**
  - Employer contributions? **Yes / No**

Please provide certificates, statements or pay slips showing all pension contributions made by you or for you in the year ended 5 April 2024. **If paid by deduction from salary, we will require your payslips for the year to ensure that the correct tax treatment is identified.** If your pension is administered by Pacific Financial Planning we will obtain this information for you.

33. Has your UK registered pension scheme administrator advised you of any Annual Allowance Charge arising for the year as a result of your pension contributions exceeding your annual allowance and any brought-forward allowance? **Yes / No**  
- If **Yes**, please provide details

An Annual Allowance Excess Charge will arise if your pension contributions for the year exceed your annual allowance and any carried-forward allowances that are available. Depending upon the circumstances, the tax charge may be paid from the scheme either under the *mandatory scheme pays* or *voluntary scheme pays*. Where you are only entitled to use voluntary scheme pays, the deadline for requesting the scheme to pay the tax charge will be set by the scheme and may be as early as 31 July 2024. **If you are eligible to use voluntary scheme pays and wish to do so you will need to complete and return your Tax Return Questionnaire soon after 5 April 2024 or the deadline may be missed.**

34. Have you previously flexibly accessed your money purchase pension benefits? This may be because you took your entire pension pot as a lump sum or put your pension pot money into flexi-access drawdown and started to take an income. **Yes / No**  
- If **Yes**, have you been advised by the pension scheme that your contributions have exceeded the Money Purchase Annual Allowance and incurred an Annual Allowance Charge? **Yes / No**  
- If **Yes**, please provide details

35. Are you a member of an overseas pension scheme that is not registered in the UK? **Yes / No**  
- If **Yes**, please provide details

36. Did you make any payments to a trade union/friendly society for death benefits? **Yes / No**  
-If **Yes**, please provide details.

37. Do you have a **mortgage** on your principal private residence where the funds have been used to purchase or improve a let property or have been used as business collateral? **Yes / No**  
- If **Yes**, we will require a mortgage interest certificate for the year ended 5 April 2024.

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**PLEASE RETURN BY 31 JULY 2024**

38. Do you have any other loan(s) for business purposes, or the purchase or improvement of a let property?  
- If **Yes**, please supply the Loan Certificates for the year ended 5 April 2024 (you may need to ask your lender to provide this). **Yes / No**
39. Did you make any Investments in Community Development Finance Institutions within the Community Investment Tax Relief Scheme?  
- If **Yes**, please provide us with your tax relief certificate. **Yes / No**
40. Have you made any Gift Aid donations to charity since 6 April 2023?  
- If **Yes**, please supply the names of all charities to which Gift Aid donations were made and the amount donated for the year ended 5 April 2024 and during the period 6 April 2024 to TODAY if you would like to carry back the relief to 2023/24. **Yes / No**
41. Did you make any gifts of investments or other assets to charities?  
- If **Yes**, please supply details. **Yes / No**
42. Did you subscribe for new ordinary shares in a Venture Capital Trust or Enterprise Investment Scheme or Seed Enterprise Investment Scheme?  
- If **Yes**, please supply details of the name of the trust/scheme, the date the shares were issued and amount paid and send any relevant documentation to us. **Yes / No**
43. Did you make payments of rent on UK property or payments of interest to someone who normally lives outside the UK?  
- If **Yes**, please supply details and send any relevant documentation to us. **Yes / No**
44. Have you ceased business within the past 7 years and made any payments in respect of that business in the year? For example; professional indemnity insurance, cost of remedying defective work and bad debts.  
- If **Yes**, please provide details and send any relevant documentation to us. **Yes / No**
45. At 6 April 2023 did you have an outstanding Income Contingent Student Loan?  
- If **Yes**, please provide your most recent statement and confirm the date that you left your course. **Yes / No**
46. At 6 April 2023 did you have an outstanding Postgraduate Master's Loan?  
- If **Yes**, please provide your most recent statement and confirm the date that your course finished. **Yes / No**
47. Have you gifted cash or assets (other than to your spouse or civil partner) during the year ended 5 April 2024 which in total exceeded £3,000?  
- If **Yes**, please provide details. **Yes / No**
48. Have you ever gifted any assets (other than to a spouse or civil partner) and still retained some benefit from these assets?  
- If **Yes**, please provide details. **Yes / No**

**Please provide details of any other income (including royalty income) you have received, other expenses paid or any other assets acquired or disposed of during the year ended 5 April 2024 or anything else which you think may have a bearing on your tax position for the year.**

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**PLEASE RETURN BY 31 JULY 2024**

## Allowances

49. Did you, or your partner, receive Child Benefit at any time during the year ended 5 April 2024? **Yes / No**
- (Your partner is your husband or wife or civil partner, unless you are permanently separated from them, or the person you are living with as if they were your husband, wife or civil partner. The partner you are living with does not have to be the mother or father of the child). If **Yes**, we may need to contact you further on this matter.
50. Are you married or in a registered civil partnership? **Yes / No**  
- If **Yes**, please give the following details:
- Your spouse's/civil partner's Name \_\_\_\_\_
- Your spouse's/civil partner's D.O.B. \_\_\_\_\_
- Date of marriage/civil partnership \_\_\_\_\_
51. Have you become separated from your spouse/civil partner since 6 April 2023? **Yes / No**
52. Have you or your spouse/civil partner applied for Marriage Allowance in the year ended 5 April 2024? **Yes / No**
- (Marriage Allowance allows you or your spouse/civil partner to transfer £1,260 of personal allowance for 2023/24 where;
- the transferor's income is below the personal allowance, and
  - the transferee's income is not liable to income tax above the basic rate.
53. Are you registered blind? **Yes / No**  
- If **Yes**, please give the following details:
- Date you were registered blind. \_\_\_\_\_
- Name of your local authority. \_\_\_\_\_
54. Did you reside overseas either wholly or partly during the year to 5 April 2024? **Yes / No**  
- If **Yes**, please provide details of the number of days you were physically present in the UK at midnight during the year ended 5 April 2024. We may need to contact your further on this matter.
55. Are you or have you been party to any tax avoidance schemes? **Yes / No**  
- If **Yes**, please provide us with form AAG6 which details the scheme reference number which should have been provided to you by the promoter or person involved in the supply of the arrangement (unless you have previously supplied this information to us).

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**PLEASE RETURN BY 31 JULY 2024**

**Other Information**

56. Please supply any other information you may consider relevant to your personal tax affairs

[Empty box for providing other information relevant to personal tax affairs]

*continued.....*

**PLEASE RETURN BY 31 JULY 2024**

**Specific Advice**

**Universal Credit, Child Tax Credit, Working Tax Credit and Child Benefit**

As part of Self Assessment, we are not required to complete the above forms. However, if you would like our advice regarding these tax credits, please contact us.

**Life Insurance & Critical Illness Insurance**

- 57. Many people do not have as much life and critical illness insurance as they need even though this can be relatively inexpensive to arrange.  
Do you have enough cover to pay all your liabilities and provide for your loved ones should you die or be diagnosed with a critical illness? Yes / No  
Pacific Financial Planning are Independent Financial Advisers and they offer a review service. May we contact you to discuss the benefits of this cover? Yes / No

**Retirement**

- 58. If you are approaching retirement and have pension policies it is extremely important to take independent advice and not accept the pension offered by your normal provider without first checking the marketplace.  
Would you like us to contact you to discuss how Pacific Financial Planning can help you to maximise your retirement income? Yes / No
- 59. If you are not already drawing your state pension we recommend that you consider confirming your contributions record regularly with the National Insurance Contributions office.  
Would you like us to check this for you and advise you regarding any years with incomplete or no contributions? Yes / No

**Wills and Lasting Powers of Attorney**

- 60. Do you have a current Will? Yes / No  
We provide a bespoke Will drafting and advice service starting from £500 + VAT. If you haven't yet made a Will or if you would like to update an existing Will would you like us to contact you to discuss drafting a Will for you? Yes / No  
For your information, we now also undertake estate administration work and advice, and we provide executorship services upon request.
- 61. We also provide a Lasting Powers of Attorney drafting and advice service. There are two types of lasting Power of Attorney - **Property and Financial** and **Health and Welfare**. Our fee for the preparation of the forms, and submitting these to the Office of The Public Guardian for registration (but not including the registration fee) will be from £500 + VAT .  
Would you like us to call you to discuss this service? Yes / No

**Inheritance Tax**

- 62. Inheritance tax is charged at the rate of 40% and the current tax exempt threshold is £325,000 and there is a residence nil rate band of £175,000 which may or may not be available to you.  
Would you like us to review your Inheritance Tax position? Yes / No

**Investments**

- 63. If you have investments, whether via ISA, Unit Trusts or a Pension, you should try to review these at least annually to ensure you maximise their performance. If you wish to do this with the help of our professionally qualified and experienced advisers, then we offer this service for a fee. The first hour's meeting is FREE of charge to ascertain your needs, and to give you details of the cost for the amount of work that will be required, which will depend on the complexity of your affairs.  
May we contact you regarding this service? Yes / No

**Your Signature**

Signed \_\_\_\_\_

Date \_\_\_\_\_

*continued.....*

**PLEASE RETURN BY 31 JULY 2024**

We also offer the following services and more!

- Independent Financial Advice
- Retirement Planning
- Pensions
- SSAS and SIPPs
- Inheritance tax planning
- Investment advice
- Tax Planning and Mitigation
- Self-assessment tax returns
- Corporation tax
- Annual accounts
- Management accounts
- Book-keeping
- Payroll
- Wills
- Estate planning
- Estate administration
- Lasting powers of attorney



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