

INFORMATION REQUIRED FOR YOUR 2008 TAX RETURN - Page 1

PERSONAL INFORMATION

Your Full Name _____

Your Date of Birth _____

Spouse's Full Name _____

Spouse Date of Birth _____

FILING INFORMATION

Marital Status _____ Date Married (if after 5.4.2007) _____

Residence Status for Tax Purposes (Please complete one of the following)

If you are Resident in the UK Tick this box

If you are NOT Resident in the UK Tick this box

(Please also complete the non-residents questionnaire NR 1.)

CHILDREN'S TAX CREDIT (CTC)

If you have a child(ren) who was(were) born after 5.4.90 state date of birth of youngest _____

Please also answer the following questions

1. If the Child is your own or lives with you. Tick this box

2. If you or your partner has received a PAYE Tax Coding Notice showing
the Children's Tax Credit. Attach a copy of the notice(s). Tick this box

3. If you and/or your partner pay income tax at 40% Tick this box

4. Please state whether you or your partner has the higher income Partner Me

OTHER

If you are married and your wife is totally incapacitated. Tick this box

If your spouse died after 5.4.07. Tick this box

Are you liable to make Student Repayments on an Income Contingent Loan Tick this box

If you received any repayment of income tax for 2006-07 income. Tick this box

Tick if
applies

EMPLOYMENT Enclose P60(s) Started a new job? Please give start date. ______

If you left an employment give date finished. Attach P45. ______

BENEFITS-IN-KIND Please forward a copy of Form P11Ds. Your employer(s) should give this to you.

SELF-EMPLOYMENT Specify the nature of your businesses _____

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- SELF-EMPLOYMENT
- Please send us your books and details of assets bought and sold.
If we have agreed to carry out the bookkeeping please forward your data.
- If you are a sub-contractor please forward CIS Certificates or a schedule of payments received if these are not available.
- Please review help sheet attached.
- PARTNERSHIP
- Give names of partners and the agreed shares of profits/losses.
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- Please now give the information requested in SELF-EMPLOYMENT, This is how you are viewed for Tax purposes.
- PENSIONS - STATE
- Enter weekly rate for period 06.04.07 and 05.04.08 shown in your pension book or in Benefit & Pensions Directorate advice. £_____
- or provide a copy of the annual letter..
- PENSIONS -OTHER
- Please forward a P60 in respect of each pension. If no tax is deducted kindly give details – see schedule from last year's tax return (if applicable).
- FUTURE PENSIONS
- If you expect to receive a new pension after 05.04.08 please give the following information: Expected start date ___/___/___
- Amount of Pension £_____. At what interval is payment of this amount expected (e.g. weekly, monthly etc)
- INTEREST INCOME
- Please provide details of all interest received in the year to 05.04.07 (Bank, Building Society, National Savings) See schedule from last year's tax return (if applicable).
- DIVIDEND INCOME
- Please provide details of all dividends received in the tax year. See schedule from last year's tax return (if applicable).
- PROPERTY INCOME
- Please see Property Sheet PR1 and advise us if you have acquired or sold any property on which you have received rental income.

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- CAPITAL GAINS** Please provide a list of the shares and other investments that you Sold. Copies of stockbroker/ bank contract notes would be acceptable.
- If you have sold your home please give brief details as in some circumstances details will need to be put on your Tax Form.
- OTHER INCOME** If you have other income that has not been requested above please provide details on a separate sheet. This includes withdrawals (Chargeable Gains) from Life Assurance Contracts.
- Please note that income and gains from PEPs, TESSAs and ISAs are tax exempt and need not be declared.
- PERSONAL PENSION & STAKEHOLDER** Note if payments are made direct from your payslip do not give details. Otherwise give details of actual payments made as shown on your Bank Statements and details of Pension Company(ies).
- AVC PREMIUMS** Have you had any AVCs repaid to you? Please give details.
- GIFT-AID** Please provide a list of Gift Aid payments made, this should include the name of the Recipient and the amount gifted. If you have gifted Investments or property to charity please provide details. See schedule from last year's tax return (if applicable).
- OTHER DEDUCTIONS** If you have made any other payments or are entitled to any deductions not covered above please enclose a separate schedule giving full details.
- TAX NOTICES** Have you received any notices concerning this Tax Year (2007/08) from the Inland Revenue? Please forward copies.

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