

**GARBETTS – CHARTERED CERTIFIED ACCOUNTANTS
2009/10 SELF ASSESSMENT RETURNS DATA REQUEST**

- Please help us to complete your tax return efficiently by completing this form.
- If you need help contact the tax department on 01983 400350 or office@garbetts.com
- In all cases we need information for the period 6 April 2009 to 5 April 2010.
- **Please let us have this form back AS SOON AS POSSIBLE and NO LATER THAN 31 MAY 2010.**
- If you need more space, please continue on a separate sheet.
- Please make sure you clearly show whether items such as interest, dividends or pension payments are gross or net of tax. If you have a business bank account as a sole trader or partnership, any interest earned on your current account needs to be noted for inclusion on your personal tax return.
- If you are a director of a company and we act for the company on payroll matters then you do not need to enter amounts for salary, benefits, expenses or dividends. You should mention that the source of income is received though.
- If you are self employed then this form is separate to your business accounts. Items such as rent, pension payments, interest or similar should still be shown, even if reported in the business accounts.
- If your business year end is 31 March or 5 April and your business is very small, please enclose the business records along with your tax records.
- Where income is shared with another person, eg joint savings accounts, please indicate clearly whether the figures given are your share or the total.
- If there is anything that you think is relevant to your tax affairs but not covered in this form then please provide details.
- If it would assist you in completing this form to have a copy of last year's return, please contact the office on 01983 400350 or e-mail office@garbetts.com

Enter your response in this box

Your full name:

Your NI number:

Your date of birth.

Marital status:

Spouses full name:

Spouses NI number.

Spouses date of birth:

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| <p><u>1. Employments (including Directorships)</u></p> <p>If you had an employment or directorship please enter the name and address of the employer and the dates of leaving and joining if during 2009/10. If you had more than one employer then please enter details for all employments.</p> <p>Please provide your P60 certificate or a week 53/month 12 payslip. If the employment ceased during the year please provide the P45 or the final payslip. (If you are a director of a company to which we provide payroll services, then we will already have this information).</p> <p>Please provide details of benefits in kind from your employer; your employer should give you a copy of the P11D form or a list of benefits and amounts. These will include company cars, travel costs, private medical treatment/insurance, and similar. Please also provide details of expenses you are claiming in your employment.</p> <p>If you are a director of a company and we act for the company on payroll matters then you do not need to enter amounts for salary, benefits, expenses or dividends. You should mention that the source of income is received though.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>2. Service Companies</u></p> <p>Do you receive income from the personal provision of your services via a Limited Company (as distinct from employing others in your business)?</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>3. Self Employments</u></p> <p>Please provide the name of all businesses (sole traders and partnerships), in which you were involved during the 2009/10 tax year.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |

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| <p><u>4.Pensions and Benefits</u></p> <p>If you receive a state pension, please state the weekly/monthly/annual amount for 2009/10.</p> <p>If you receive a pension from another source, please provide the P60 certificate which you will be sent at the end of the tax year.</p> <p>If you receive job seekers allowance or income support because of unemployment, then please provide details of the amount received. This will normally be issued in a letter when you "sign off" or on an end of year statement if your claim spans a tax year.</p> <p>Please provide details of any other state benefits. We do not need details of Child Benefit.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>5.Income from Property</u></p> <p>If you have any properties that you let out, then please give the address of the properties and provide details on a separate sheet of rent received and expenses paid.</p> <p>If there is a mortgage on the property please provide a statement or Interest Certificate from the lender.</p> <p>If the property is in split ownership, please provide details.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |

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| <p><u>6.Income from Savings</u></p> <p>If you receive interest on a bank or building society account, please provide the name(s), account number(s) and amount(s) received for the tax year. <u>Please state whether the amount received is gross or net of income tax. In respect of joint holdings please also state whether the amounts shown are your share only or the full amount.</u></p> <p>If you receive dividends on shares, unit trusts or similar please provide the name(s) of the payer(s), and amount(s) received for the tax year. <u>Please state whether the amount received is gross or net of income tax. In respect of joint holdings please also state whether the amounts shown are your share only or the full amount.</u></p> <p>If you have income from trusts, share options or any other form of investment income, please provide full details.</p> <p>If you have received any compensation from mis-selling of mortgages and pension plans, the interest that has been accrued, please provide full details.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>7.Income from Capital Gains</u></p> <p>If you have sold assets such as a shares or property, please provide full details of the assets sold, the amounts realised, and if known, the original cost of the asset.</p> <p>Please provide details of any "windfall" gains received from conversion of building societies, life companies, etc.</p> <p><u>We do not need details of the sale of a private residence, so long as it as always been a private residence.</u></p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>8.Pre-Owned Assets</u></p> <p>Do you receive any benefit from previously owned assets that you have given away in a tax mitigation scheme?</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |

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| <p><u>9. Foreign income</u> If you received any taxable income from overseas or foreign sources i.e. Employment, pensions, benefits, land and property income, interest and/or dividends from foreign companies or savings institutions, offshore funds.</p> <p>Please provide as much detail as possible and also details of any foreign tax credit you may have paid so that you can get relief for the foreign tax paid on foreign income and/or gains.</p> | Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick) |
| <p><u>10. Overseas</u></p> <p>If you are classed as a non-resident, please state</p> <ul style="list-style-type: none"> • the amount on non-travelling days spent in the UK in the year ending 5 April 2010 • the number of individual visits to the UK <p>the country in which you were/are resident during that time</p> | Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick) |
| <p><u>11. Non-UK Domicile</u></p> <p>If you are, or believe you may be, non-UK domiciled, please let us know. Generally this means that you were not born in the UK and have not officially adopted the UK as your domicile of choice, cutting ties with your domicile of origin.</p> <p>If you are unsure, please contact your Accounts Manager or our Tax Department.</p> <p>If you <u>are</u> non-domiciled you need to choose whether to claim the remittance basis for any overseas income and gains. Please let us know if you have <u>any</u> overseas income or property, as it may be relevant to your situation.</p> | Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick) |

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| <p><u>12.Pension Payments</u></p> <p>If you pay into a personal pension plan (PPP) (these are all now paid net) or retirement annuity plan (RAP) (paid gross) please provide the name(s) of the pension company, the amounts paid in the tax year and advise whether each policy is a PPP or RAP. Similarly, if you make Freestanding AVCs (FSAVC), we will need full details.</p> <p>We do not need details of superannuation/pension payments deducted from your pay.</p> <p>We do not need details of payments made by your employer, eg Executive Pension Schemes.</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>13.Charitable Gifts</u></p> <p>If you make payments by deed of covenant or gift aid, please provide details of the dates, amounts and payees</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |
| <p><u>14.Other Information</u></p> <p>If there is anything else which you consider relevant to your tax affairs, please let us have details, e.g. student loan repayments due, trust income. Please make sure we have details of all sources of income, including overseas sources. If in doubt please provide us with full details for a decision to be made on the tax status of an item.</p> <p>THANK YOU FOR COMPLETING THIS FORM</p> | <p>Details below <input type="checkbox"/> None/nil <input type="checkbox"/> (please tick)</p> |