

**ALAN HEYWOOD & COMPANY**

**CHARTERED ACCOUNTANTS, REGISTERED AUDITORS & BUSINESS ADVISORS**

**SELF ASSESSMENT TAX RETURN 2010/11 QUESTIONNAIRE**

NAME \_\_\_\_\_

This questionnaire covers your income, deductions and capital gains for the year ended 5<sup>th</sup> April 2011.

During 2010/11 were you: (Please Tick )

- |               |     |                    |
|---------------|-----|--------------------|
| Self-employed | ( ) | Complete section A |
| Employed      | ( ) | Complete section B |
| Retired       | ( ) | Complete section C |

**SECTION A – INCOME FROM SELF-EMPLOYMENT**

- If you commenced in the year, give commencement date.
- If you ceased during the year, give cessation date.

**SECTION B – INCOME FROM EMPLOYMENT**

Complete this section if you worked for an employer (under PAYE) in 2010/11:

- Employers name and address:
  
- Gross salary earned  
(**must** include your P60)
  
- Include P11D received from your employer.

**GIVE DETAILS**

£

**COMPLETE THE FOLLOWING SECTIONS AS RELEVANT TO YOU:**

**SECTION C – ANY OTHER INCOME**

Complete this section if you received any other forms of income in 2010/11:

- Pensions (e.g. Private Pension, State Pension & Widow's pension)

- **Income from land and property**

Date commenced

Property address

Gross rents before expenses

Summary of expenses (include separate schedule)

- **Income from savings & investments:**

Bank interest – specify name of bank

Building society interest – specify name of building society

Dividends – specify company name in each case

- **Any other sources**

e.g. Income and capital from estates and settlements / job seekers allowance

£

Net Interest £	Tax Deducted £	Gross Interest £	Name
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£

**GIVE DETAILS**

(Please Tick )

( )

**SECTION D – CAPITAL GAINS**

Complete this section if you have sold any shares or other capital assets in 2010/11:

- Tick here if your gross proceeds were less than £10,100
- If the gross proceeds were more than £10,100 give the following details: -

a) On shares: -

Sale proceeds

Cost of shares

Date sold/purchased

On a separate sheet

- b) If you have sold any other capital assets (e.g. Investment property) Please provide details on a separate sheet.

**SECTION E – ALLOWANCES & RELIEFS**

**a) PENSION CONTRIBUTIONS**

- Payments to your retirement annuity contracts for policies taken out before 1<sup>st</sup> July 1988.

Amount paid in 2010/11 £

- Payments to your personal pension (including stakeholder pension) scheme.

£

The amount of payment you made (i.e. net of basic rate tax) in 2010/11. £

**b) RELIEFS**

Give details of any reliefs you wish to claim:

- Interest eligible for relief on qualifying loans.
- Maintenance or alimony payment you made under a court order.
- Subscriptions for Venture Capital Trust shares.
- Subscriptions under the Enterprise Investment Scheme.
- Gift Aid payments, including covenanted payments to charities.

£

£

£

£

£

**PLEASE RETURN THIS QUESTIONNAIRE COMPLETED WITH YOUR SIGNED 2010/11 TAX RETURN WHEN YOU HAVE RECEIVED ALL RELEVANT PARTICULARS.**

**DECLARATION**

The information that I have given on this questionnaire is correct and complete to the best of my knowledge and belief.

SIGNED: \_\_\_\_\_

DATE: \_\_\_\_\_