



# 2026 Tax Return Questionnaire

Please ensure the supporting documents are returned with this form

Name: \_\_\_\_\_

## 1. Self Employment / Partnership

Did you have any self-employed or partnership income in the year ended 5th April 2026?  Yes  No

If yes: FFT will be completing your accounts, please provide records

## 2. Employment

Were you employed during any part of the year ended 5th April 2026?  Yes  No

If the payroll of your employer is dealt with by FFT, the relevant information will be held at this office.

If yes: Provide a copy of your form P60 for the year and P11D if applicable

## 3. Pensions

Do you receive a pension from either State, a private source or a former employer?  Yes  No

If yes: Provide P60 or alternative confirmation of amounts

## 4. Investment Income

Did you receive any of the following types of income?

- |                                  |                              |                             |
|----------------------------------|------------------------------|-----------------------------|
| Bank / Building Society interest | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| National Savings interest        | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Dividends from shareholdings     | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Any other investments            | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If yes to any of the above: please provide the relevant certificates and/or vouchers

## 5. Rental Income

Do you have any properties, either in the UK or overseas, available for letting?  Yes  No

If yes: Provide details of rental income and expenses

## 6. Other Income

Did you receive any other sources of income not included in Sections 1 to 5, including income from Trusts, overseas sources or Cryptocurrency transactions?  Yes  No

If yes: provide full details

## 7. Reliefs

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- Do you make Personal Pension payments?  Yes  No
- Do you make Retirement Annuity payments?  Yes  No
- Do you make any Charitable Contributions under Gift Aid?  Yes  No
- Do you make any Loan Interest payments on which you are entitled to relief?  Yes  No

If yes to any of the above: please provide documents confirming the amounts

## 8. Capital Gains

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- Did you dispose of any assets during the year?  Yes  No
- Were the assets disposed of worth £50,000 or more?  Yes  No
- Was the gain on the disposal £3,000 or more?  Yes  No
- Did you make any Capital Losses in the year?  Yes  No

If yes: please provide full details

**Please note: if you made a taxable gain on the sale of a residential property, it needs to be reported to HMRC within 60 days of completion and the tax paid by that date also.**

## 9. Student Loan

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Have you had the benefit of a Student Loan that has not been fully repaid?  Yes  No

Plan type:  Date loan repaid (if applicable): \_\_\_\_\_

## 10. Child Benefit

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Were you or your partner in receipt of Child Benefit at any time during the year to 5th April 2026?  Yes  No

Number of children: \_\_\_\_\_ Start date (if applicable): \_\_\_\_\_ Date ceased (if applicable): \_\_\_\_\_

## 11. Notes and any other information

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## Declaration

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_

Mobile No: \_\_\_\_\_ Email: \_\_\_\_\_