

2025 Questionnaire for Example Test

To enable us to complete your 2025 Tax Return, we ask that you provide all relevant information for the period 6 April 2024 to 5 April 2025 using the questions below as a guideline. If any information is incorrect please make amendments as required.

If we are to prepare a correct tax return it is important that you provide complete and accurate information about all your income and outgoings for the year. The questions below are tailored to help you provide the information, and there is space to include any further items that you believe may be relevant to your tax affairs.

Personal information

Please check the following information and make any corrections as required

Email address	Mobile Telephone	Home Telephone	Work Telephone
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address - Building/Street			
<input type="text"/>			
Town	County	Postcode	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
If your address has changed, when did you move to your new home?			
<input type="text"/>			
Your date of birth	Your National Insurance number		
<input type="text"/>	<input type="text"/>		

Scottish and Welsh taxpayers

Have you been notified by HMRC that you are a Scottish or Welsh Taxpayer for the year ended 5 April 2025?

Scottish Y/N	Welsh Y/N
<input type="text"/>	<input type="text"/>

Self employment: Business

Please provide bookkeeping records for each of your businesses if you have not already done so.

Name of business	Description of business			
<input type="text" value="Business"/>	<input type="text"/>			
End of your accounting period	Turnover	Expenses	CIS deducted	Date business ceased
<input type="text" value="30/04/2025"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other information, notes etc.				
<input type="text"/>				

Partnership income

Please forward all partnership statements for year ended 5 April 2025

Name of partnership	Tax reference	Description of trade	Date left
<input type="text" value="IRIS Content LLP"/>	<input type="text"/>	<input type="text" value="IRIS Content LLP"/>	<input type="text"/>

Any other income from the UK or abroad?

Examples of other income to include are: Untaxed interest; Taxed interest; Dividends from UK companies; Stock dividends; Other dividends; Employments; State pension and other benefits; Other pensions; Rental income etc; Chargeable event gains; Income from a trust; Foreign savings income; Dividends from foreign companies; Overseas pensions etc; Income from land or property abroad; Income from a UK or foreign estate; Income chargeable to you as settlor of a trust; Accrued income; Interest from Gilts; Bonus issues of securities and redeemable shares; Close company loans written off; Share scheme chargeable events; Lump sums from employment (e.g. redundancy)

Give as much detail as you can

Marriage Allowance Transfer

Have either you or your spouse elected to transfer part of your Personal Allowance to the other?

Y/N
☐

Other reliefs that might reduce your tax bill

Examples of other possible reliefs are: Gift Aid; Payroll Giving; Pension payments; Blind person's allowance; Gifts to charity; Subscriptions to a Venture Capital Trust; EIS or Seed EIS investments; Community or Social Investment Tax Relief; Interest paid on loans taken out for a qualifying purpose; Seafarers' deduction; Post-cessation losses; Maintenance or alimony payments; Payments to a trade union for death benefits; Payments to a compulsory employer widow/orphan scheme; Relief on redemption of bonus shares

Give as much detail as you can

Disposals of property, shares and other assets in the year ended 5 April 2025

Details of any residential property (including your home) sold in the year

Details of any other property or land sold

Details of any shares sold

Details of any other assets sold, including business assets