

General Tax Questionnaire



PEPLOW'S
CHARTERED ACCOUNTANTS

Answering the following questions will help to assist us in ensuring you claim all the tax reliefs you are eligible for.

Tax status of you and your spouse, e.g non taxpayer, basic rate, higher rate etc	
Do you or your spouse/partner living with you claim child benefit? If so, for how many children?	
Are you or your spouse registered blind?	
Are you or your spouse a full time carer?	
Do you work from home?	
What is your occupation (fixed rate deductions may apply)?	
Do you pay professional subscriptions or buy tools?	
Do you receive any benefits in kind e.g private medical cover?	
Do you have an outstanding student loan? If so, is it plan 1 or 2?	
Do you contribute to a personal pension?	
Do you have a workplace pension? If so, please provide a recent payslip.	
Are you in receipt of the state or an occupational pension?	
Have you checked your state pension record?	
Are you in receipt of any state benefits?	
Do you have any income from a foreign source?	
Do you make regular donations to charity under gift aid?	
Do you have investment property?	
Is it a holiday let?	
Have you remortgaged in the last 4 years?	