



turpin barker armstrong
Accountants, Auditors and Business Advisors

2025/26 SELF-ASSESSMENT
INCOME TAX QUESTIONNAIRE (ITQ)

Name: _____

Home Tel: _____

Client Ref: _____

Work Tel: _____

Mobile Tel: _____

E-mail: _____

Home Address:

Signature

Completion Date

Checklist

Have you...

- Completed the personal/contact information details above?
- Ensured that all relevant questions have been answered in full?
- Provided us with your accounting books and records if self-employed?
- Signed and dated the questionnaire confirming its accuracy?
- Attached all relevant supporting documents at Section 5?

(P60's, P45's if relevant, share certificates, dividend vouchers, interest income certificates/ statements, mortgage interest statements, P11D's, EIS/SEIS certificates)

If you have any queries relating to this questionnaire then please call us on 020 8661 7878

**INCOME TAX QUESTIONNAIRE
INTRODUCTION**

(6th April 2025 to 5th April 2026)

Yes
"✓"

No
"✓"

- Did you receive income from: -

- a) Employment
- b) Self Employment
- c) Partnership
- d) Pensions
- e) State Benefits
- f) Child Benefit (NB: Including child benefit received by your partner)
- g) Student Loans
- h) Government Grants

- Did you receive income from any of the following: -

- a) Bank or other source of interest
- b) Dividends from shares/investments
- c) Rental property
- d) Overseas income
- e) Trusts, settlements or estates

- Did you sell any assets during the year which were subject to a capital gain?

- Did you contribute to any of the following: -

- a) Pension Contributions
- b) Gift Aid Payments
- c) Any other tax saving scheme

- Did you receive any other forms of income for the year?

If yes please attach supporting documentation which is relevant for the completion of your return.

SECTION 1 – FORMS OF INCOME

Yes
"✓"

No
"✓"

a) Were you employed under PAYE during the year?

If yes, please provide/upload a P60 or P45 for each form of employment

Did you receive any benefits from any form of employment?

If yes, please enclose/upload form P11D

b) Were you self employed during the year?

If yes, please forward your books and records to us at your earliest possible convenience.

c) Were you a partner in any business during the year?

If yes, please forward us the partnership books and records.
If we do not prepare the partnership accounts, please provide us with accounts to cover the relevant period

d) Did you receive income from any type of pension during the year?

If yes please provide/upload a P60 and complete the details below

Source or Payer	Gross Income	Tax Deducted
.....	£	£
.....	£	£
.....	£	£
.....	£	£

e) Did you receive any State benefits for the year ended 5th April 2026 i.e. State Pension, or other taxable benefits?

If you have answered yes and receive child benefit please see part 'f'. For any other benefits please state the type of benefit received and the name and address of your Benefit Office below:

Type of benefit

Address of benefit office

.....

Amounts received

.....

SECTION 1 – FORMS OF INCOME (CONT...)

Yes
"✓"

No
"✓"

h) Did you receive any form of government grant for the year ended 5th April 2026?

If you have answered yes and have received any form of government grant please provide details below.

<u>Type of Grant</u>	<u>Date Received</u>	<u>Amount Received</u>
.....	£.....
.....	£.....
.....	£.....
.....	£.....
.....	£.....

SECTION 2 – SAVINGS & INVESTMENTS

Yes
"✓"

No
"✓"

a) Did you receive any income from bank accounts or other forms of interest?

If yes please provide details below. If this was a joint account this should only detail your share.

<u>Source</u>	<u>Account No</u>	<u>Gross</u>
.....	£.....
.....	£.....
.....	£.....
.....	£.....
.....	£.....

Yes
"✓"

No
"✓"

b) Did you receive any income from dividends?

Please supply the following details together with a copy of the dividend vouchers.

<u>Company Name</u>	<u>Date of Receipt</u>	<u>Amount received</u>
.....	£.....
.....	£.....
.....	£.....
.....	£.....

SECTION 2 – SAVINGS & INVESTMENTS (CONT...)

Yes
"✓"

No
"✓"

c) Did you receive any rental income from UK land or property?

Please provide details of all income and expenses associated with each property, together with appropriate records.

If you commenced letting a new property during the period, please would you confirm:

- Date letting commenced _____
- Was the property jointly let? _____
- Was the property furnished or unfurnished? _____
- If the property was financed via mortgage, please confirm the monthly repayments and if the payments are on an interest only basis _____

If you purchased/sold a property during the year, see Section 3.

d) Did you receive any income from overseas during the tax year?

If yes please provide details of all overseas income (including, for example, any foreign tax deducted at source and/or overseas property income) and associated expenses, together with appropriate records.

<u>Source</u>	<u>Currency</u>	<u>Gross</u>	<u>Foreign Tax</u>	<u>Net</u>
.....
.....
.....
.....

Yes
"✓"

No
"✓"

e) Did you receive any income from trusts, settlements or estates?

If yes please provide supporting documentation which is relevant for the completion of your return.

SECTION 3 – CAPITAL GAINS

Yes
"✓"

No
"✓"

a) Did you purchase or sell any capital assets during the year, i.e property or shares?

If yes please provide/upload supporting documentation (see below):

Property Disposal

- A copy of the purchase completion statement
- A copy of the sales completion statement
- Details of any improvements during ownership
- Details of ownership and/or dates when this changed
- Details of any period you were living in the property
- Details of any period you were letting the/parts of the property
- Was this your 'Main Residence' throughout the period of ownership
- Anything else you feel may be relevant

Disposal of Shares

- A copy of the purchase certificate (including price paid)
- A copy of the disposal certificate (including amount received)
- A copy of any share rights/bonus issue certificates throughout the period of ownership
- Details of the relationship between you and the company.

Disposal of Property

Since April 6th, 2020, all capital gains tax should have been reported and paid within 60 days of a property being sold.

If you have disposed of a property during the period 6th April 2025 to 5th April 2026, please confirm whether you have reported and paid any capital gains tax.

Yes
"✓"

No
"✓"

If ticked yes, please provide the following information:

Real Time Transaction Return Reference Number (E.G XECGTP000000000)

.....

Gain or (Loss) Reported on Transaction Return

.....

Amount of Capital Gains Tax Reported on Transaction Return (if applicable)

.....

Date Capital Gains Tax Paid To HMRC (if applicable)

.....

SECTION 4 – PENSIONS AND RELIEFS

Yes
"✓"

No
"✓"

a) Did you contribute to a personal or retirement annuity pension during the year?

If yes please provide details below and attach the end of year statement to the questionnaire.

<u>Name of Pension Company</u>	<u>Scheme Number</u>	<u>Amount/ Frequency of payment</u>	<u>Total Contribution paid in year to 05/04/26</u>
.....	£.....
.....	£.....
.....	£.....
.....	£.....

Yes
"✓"

No
"✓"

b) Did you make any payments under the gift aid/or deed of covenant scheme?

If yes please provide details below

<u>Recipient or charity name</u>	<u>Total paid in year</u>
.....	£.....
.....	£.....

Yes
"✓"

No
"✓"

c) Did you make any payments into any other tax saving scheme, excluding ISAs, eg. Enterprise Investment Schemes, Seed Enterprise Investment Schemes, Venture Capital Trusts?

If yes please provide documentation showing type of scheme and amounts paid into it.

SECTION 4 – CONT...

Yes
"✓"

No
"✓"

d) **MARRIAGE ALLOWANCE:** - Did your spouse or partner earn less than their personal allowance of £12,570 in the 2025/26 tax year.

If so, have they made an application to transfer part of the personal allowance to you? If yes please provide their name, national insurance number, date of birth and date of marriage/civil partnership:

SECTION 5 - SUPPORTING DOCUMENTS
& ADDITIONAL INFORMATION

Finally, please provide details of any additional information which you believe may be relevant for the completion of your return (you may attach further sheets of paper as necessary).

Please also attach all supporting documents as appropriate:

- P60's
- P45's where relevant
- Share certificates
- Dividend vouchers
- Interest income certificates/ statements
- Mortgage interest statements
- P11D's
- EIS/SEIS certificates

ADDITIONAL INFORMATION (IF APPLICABLE):

Please complete our financial health check questionnaire which will be passed onto our Wealth Management team:

Financial Health Check Questionnaire

Name:

Contact Number:

Email address:

We'd like to understand how we can support you more effectively. This short questionnaire can help us identify where we could provide further support.

What are your main financial concerns right now?

- Tax Planning (personal or business)
- Budgeting / Saving (income & expenditure)
- Financial Protection (individual, family or business)
- Business Growth / Funding
- Succession Planning or Exit Strategy
- Investment Planning (cash, stocks & shares, property etc)
- Other (please specify): _____

How confident are you that your financial plans / goals are on track and tax efficient?

- Very confident
- Somewhat confident
- Not confident
- Not sure / would like a review

Have there been any major changes in your circumstances recently - business expansion, family event etc?

- Yes
- If yes, please briefly describe

- No

Would you be interested in advice on any of these topics?

Please tick any that apply

- Business and/or Personal Cashflow Planning
- Pension and Retirement Planning
- Investment Planning
- Estate & Succession Planning
- Financial Protection Options



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