

Please complete all relevant sections and provide relevant supporting documents where necessary. The period covered for the 2018 Tax Return is 6 April 2016 to 5 April 2017. If there is not enough room on form, please include the full details on separate sheets.

Our fees to you are set out in the accompanying letter. We prefer payments by Bank Transfer, our details are Wray Associates Ltd, Sort Code 40-12-04, Account Number 51891111. Otherwise, please enclose your cheque made payable to "**Wray Associates Ltd**". Additional charges will only apply if your circumstances have changed or you haven't informed us of all income when we gave a quote. We withhold the right to not submit the Tax Return until paid in full.

## **Personal (to be completed by all - amend if necessary)**

<u>Full Name inc. Title &amp; Address</u>	
<u>Telephone Number</u>	
<u>Date of Birth</u>	
<u>National Insurance Number</u>	
<u>Unique Tax Reference (UTR)</u>	
Marital Status	
<u>Spouse/Civil Partner Full Name</u>	
<u>Spouse/Civil Partner DOB</u>	
<u>Married Couples Allowance In/Out?</u>	
<u>Scottish tax payer?</u>	

## Income - Required information (where applicable)

	<u>Certificates Enclosed</u>	<u>Not Applicable</u>	<u>Comments</u>
<u>Employment income</u> - Enclose all forms P60, P45 [if you had more than one employment in the year] and tax coding notices. If the forms are not available, a copy of your last month/week payslip before 5th April 2017 should be forwarded.			
<u>Form P11D</u> - Details of expenses and benefits received from your employer(s).			
<u>Employment expenses</u> - Details of any professional subscriptions or expenses paid personally for your employers business.			
<u>Student loan</u> - Details of any student loan repayments made during the year (including a note of which student loan repayment plan you are on) and if you believe your student loan will be fully repaid within two years.			
<u>State pension</u> - The amount of state pension received in the tax year, together with the current rate of payment. State pension is paid either four weekly or monthly, please check all amounts are included.			
<u>Other pensions</u> - Details of other pensions received together with a P60 for each pension.			
<u>Minister of Religion</u> - Please complete specific sheet and enclose.			
<u>Income from Trade, Profession or Vocation</u> - If details not already provided, please supply all relevant figures, books and records.			
<u>Land and Property</u> - Please provide full details of income and outgoings on separate sheets. If more than one property owned, please ensure that details are split by property.			
<u>Income from savings and investments</u> Interest from banks and building societies inc. accounts closed during the year.			
National Savings (please include certificates).			
Other Interest Received.			
Dividends from shares in UK companies.			
Scrip Dividends.			
Income from UK unit trusts.			
Income from savings/investments held abroad.			
Income from trusts and estates. Enclose form R185/R185E.			

*Please give account numbers and state whether interest paid is net or gross*

Any other income? If so, provide full details.

### **Outgoings (to be completed by all)**

	<u>Certificates Enclosed</u>	<u>Not Applicable</u>	<u>Comments</u>
<u>Personal Pension Contributions</u> - Please enclose certificate from pension companies for all contributions for the tax year, and state whether net or gross.			
<u>Loan Interest</u> - On loans for business purposes, for properties let out, or for other qualifying purposes.			
<u>Charitable Donations</u> - Higher rate taxpayers, please provide receipts from the charities.			

### **Capital Taxes (to be completed by all)**

	<u>Certificates Enclosed</u>	<u>Not Applicable</u>	<u>Comments</u>
<u>Share Transactions</u> - Please provide contract notes and any other relevant details.			
<u>Land and Property</u> - Details of any land and property transactions, other than main residence.			
<u>Share Options Granted or Exercised</u> - Please provide full details			
<u>Gifts</u> - Please provide details of any substantial gifts made.			

### **Other Transactions (to be completed by all)**

	<u>Certificates Enclosed</u>	<u>Not Applicable</u>	<u>Comments</u>
<u>Enterprise Investment Scheme</u> - Please provide details.			
<u>Gifts Received</u> - Please provide details of any substantial gifts or inheritance received.			

*Please list on a separate piece of paper any further information which may be relevant for the preparation of your tax return. Thank you.*

## Ministers of Religion Supplementary Questionnaire

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

Nature of Post or Appointment: \_\_\_\_\_

<b>Income, fees and offerings</b> - Do you receive additional income, please advise as follows (if monies were assigned we do not need details):	<b>Received Yes/No</b>	<b>Details</b>
Salary/Stipend (P60 required)		
Funerals		
Weddings		
Offerings		
Gifts/Grants		
Chaplaincy (P60 required)		
Other		

<b>Vicarage or manse expenses paid for you</b>	<b>Yes / No</b>	<b>Details</b>
Does the church provide anything for your own personal use or pay vicarage or manse expenses for you i.e. heat/light, repairs/maintenance, provision of furniture, gardener/housekeeper.  Please supply PSA/PUN/P11D form if appropriate		

<b>Mileage Allowance</b>	<b>Yes / No</b>	<b>Details</b>
Do you receive a mileage allowance? If so, how many miles do you travel for business purposes and at what rate do you get paid.		Miles:  Pence per Mile:  Total:

<b>Expenses - please state if reimbursed</b>	<b>Yes / No</b>	
Do you incur any expenses which are necessary for the proper performance of your duties? Consider the list below.		
Please supply details of the following expenses (if applicable) ensuring receipts are available if requested. Amount and brief details.	<b>Amount £</b>	<b>Details</b>
Travelling expenses (excluding mileage already stated on previous page)		
Maintenance, repairs and insurance of vicarage or manse		
Rent paid		
Secretarial assistance (spousal costs not allowed)		
Heat & Light - Total cost. Also state how many rooms are used for ministerial business and how many rooms your home has, do not include bathrooms, cloakrooms or kitchens.		
Books and journals		
Stationery, post and telephone		
Cost of repair or replacement of robes		
Entertainment costs e.g. refreshments supplied during meetings		
Office repair costs, equipment costs e.g. computer		
Cost of domestic help i.e. cleaning, gardening		
Others e.g. window cleaning		
<b>If you have completed this form, please do not send any receipts or bills, but please retain these in the event of any enquiry by HM Revenue &amp; Customs</b>		