

2026 Individual Questionnaire

Name: Client Code:

Please provide the following information

for the period 1 April 2025 to 31 March 2026

1. Dividend income

Dividend statements

2. Overseas income

Details of overseas income and tax paid or deducted on your behalf, rentals etc

3. Pensions

Details of any overseas pensions received

4. Self-employed income

Details of income and expenses

5. Rental income

Details of income and expenses from rental property

6. Partnership Income

Details of your share of income/losses or any tax credits

7. Other income

Royalties, director fees, shares including options exercised etc

8. Income from Investment or trading in shares, Options and/or Crypto Currency

Details of trading transactions and dividends

9. Donation Claim

If you would like us to file this form on your behalf, please provide the donation receipts

Declaration

I accept responsibility for the accuracy and completeness of the information supplied in this questionnaire which is to be used in the calculation of my income from my property rental activities. You are not to complete an audit, nor do I wish to undertake a detailed review of my affairs in order to substantiate the accuracy of my information, and therefore you are not asked to provide any assurance on my financial statement. I understand your work can not be relied on to detect error and fraud and that you accept no liability for the accuracy and completeness of the information supplied by me. I further understand that the financial statements will be prepared at my request and for my purposes only and that you will not be liable for any losses, claims or demands by any third person. I also accept responsibility for all other records and information supplied to you other than those listed above. I accept responsibility for any failure by me to supply all relevant records and information to you.

Prepared By: Full Name

Signature: Signature

Date: Date