



ACCA

FREE **Tax Return** **Questionnaire**

Answer these questions and we'll tell you
exactly where you stand.

Free 15-minute meeting included.
No charge. No pressure. Just answers.

Abel Accountants

3 Hayley Court, Lodge Way, Ashford, Surrey TW15 3AH



1 About you

So we know who we're talking to.

Your full name

Your address

Phone number

Email address

National Insurance number

Unique Taxpayer Reference (UTR) — if you have one

Date of birth

Are you married or in a civil partnership?

Put a cross X in the box that applies.

Married / civil partnership

Yes

☐

No

☐

2 Your work

Tell us how you earn. Tick all that apply.

I am employed

Employed

Yes

☐

No

☐

Employer's name

Employer's PAYE reference number (on your P60 or payslip)



Did you get a P60 or P45 this year? If yes, please send it with this form.

P60 / P45 enclosed

Yes

☐

No

☐

I am self-employed

Self-employed

Yes

☐

No

☐

What does your business do?

Do you have accounts for the year? If yes, please send them.

Accounts enclosed

Yes

☐

No

☐

I am in a partnership

Partnership

Yes

☐

No

☐

What is the partnership's name?

What does the partnership do?

Are you the nominated partner (the one who files the partnership return)?

Put a cross X in the box that applies.

Nominated partner

Yes

☐

No

☐

What is your share of the profit (%)?

I rent out property

Rental income

Yes

☐

No

☐

How many properties do you rent out?

Total rent received this year (£)



3 Your money

Interest, dividends, pensions and anything you sold.

Did you earn interest from any bank or building society?

Bank interest

Yes

☐

No

☐

Did you receive any dividends (from shares you own)?

Dividends

Yes

☐

No

☐

Did you pay into a pension yourself?

Pension payments

Yes

☐

No

☐

Did you sell anything big this year — property, shares, a business?

Sold an asset

Yes

☐

No

☐

Tell us what, and roughly what you sold it for (£).

4 Anything else

The last few bits HMRC asks about.

Any other income we haven't covered — freelance odds and ends, tips, overseas income?

Have you already paid any tax this year — for example, payments on account?

Tax already paid

Yes

☐

No

☐

Are you still paying off a student loan?

Student loan

Yes

☐

No

☐

Did you give to charity and sign a Gift Aid form?



Gift Aid donations

Yes

☐

No

☐

Is there anything else we should know?



What happens next

Three simple steps.

Our 3 promises

What you can hold us to.

1. Seven days.

Your return done within 7 days of us having everything we need.

2. Accuracy.

Checked twice, with my personal review before anything is filed.

3. Fixed fee.

The price we quote is the price you pay. No surprises, ever.

1. Send it back.

Email this form — and your P60, bank statements or accounts if you have them — to **harish@abelaccounts.co.uk**. Don't worry if it's not perfect; we'll fill the gaps together.

2. Book your free 15 minutes.

Pick a time that suits you: **<https://calendly.com/harish-abelaccounts/30min>** — no charge, no pressure, just answers about where you stand.

3. We do the rest.

We'll tell you exactly what you owe, what you can claim, and what to do next — in plain English. Nothing is filed without your say-so.

Our data promise: your information stays with us — never Meta, never advertisers. Nothing is filed without your say-so.

Not all accountants are the same.



Abel Accountants — 020 3051 8236



Our fixed fees

One price. No surprises. No hourly billing.

Basic return (P60/P11d only)	£145
PAYE income (P60 + P11ds, no other income)	£150
1 property — single owner	£200
1 property — 2 joint owners	£340
2 properties — single owner	£225
2 properties — 2 joint owners	£390
3 properties — single owner	£250
3 properties — 2 joint owners	£440
Non-resident — single owner	from £225
Non-resident — 2 joint owners	from £360
Sole trader — trading allowance	£225
Self-employed — turnover under £90,000	£225–£525
Self-employed — turnover over £90,000	Quote
Partnership (return + partners' returns)	from £685
4+ properties	Quote

If your expenses are £1,000 or less and you claim the trading allowance, the £225 fee applies. If your expenses are more than £1,000, the fee is from £525.

Every return includes our data promise and my personal review before anything is filed.

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