

Records Required

INVESTMENT INCOME

	√	Comments
Interest (attach Interest Certificates)	<input type="checkbox"/>	

Dividends (attach Dividend Statements)	<input type="checkbox"/>	
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Investments changed during the year _____ _____	<input type="checkbox"/>	
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Rent Received <ul style="list-style-type: none">• Gross receipts• Expenses i.e. interest, rates, insurance, repairs collection expenses.• Give addresses of any rented properties let this year and provide the Solicitors Settlement Statement for rental properties purchased or sold during the year. (Please attach list or supply data source)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
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EXPENSES

<ul style="list-style-type: none">• Detail expenses incurred not shown above (advise source). _____ _____• If part of your home is used for business purposes, please provide a list of expenses paid, e.g. interest on mortgage, rates, insurance, telephone, electricity, etc. and the area of your home office in relation to the total dwelling.	<input type="checkbox"/> <input type="checkbox"/>	
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Thank you for completing this questionnaire
Don't forget to sign on the front page