

Initial Enquiry Form

Please complete and tick boxes where applicable



LINDEN
Associates

Tax Returns Completed From £75

Contact Details

Full Name

Address

Post Code

Telephone (Daytime)

Telephone (Evening)

Email Address

Are You...

Employed

Brief details of employment(s)

Company car? Yes No

Other benefits in kind? Yes No

Share options? Yes No

Self - Employed

State nature of business

Sole Trader

Partner

Subcontractor

VAT registered? Yes No

Estimated Turnover

Other Income

Do You Receive...

Yes No Number of sources

Income from property?

Foreign income?

State benefits? (e.g. Jobseekers)

Chargeable event gains re insurance policies?

Outgoings

Do You Pay...

Yes No Number of sources

Personal pension or retirement annuity premiums?

Chargeable payment under Gift Aid?

Investments

Do You Have...

Yes No Number of sources

Bank and/or Building Society accounts?

National Savings Bank accounts or bonds?

Dividends from Shares and/or Unit Trust holdings?

Pensions

Do You Receive...

Yes No Number of sources

State Retirement Pension?

Pension from a former employer or other private pension?

HMRC Correspondence

Do you have ongoing correspondence and / or an outstanding enquiry with the Inland Revenue? Yes No

When completed, please send this form to us:

1. By post to: Linden Associates, Linden House, Coley Avenue, Woking, Surrey, GU22 7BT

2. By email to: mail@linden-associates.com