

PERSONAL INCOME & EXPENDITURE DETAILS (P.I.E.D. form)
Year to 5th April 2024



Forenames	
Surname	

Have you received income from any of the following sources?.....
PLEASE DO NOT GIVE US ANY ORIGINAL DOCUMENTS - WE ONLY NEED COPIES

Interest		e.g. interest received from a savings account, bank etc		Yes	No
<i>If answer is "yes" could you please supply COPY certificates of interest. and details.</i>		Amount	Tax		
	Bank/Bldg Soc Name	A/c Holder Name	Rcvd (£)	Credit (£)	

Dividends		e.g. investments, share portfolio, own company etc		Yes	No
<i>If answer is "yes" could you please supply COPY tax certificates .</i>		Dividends	Tax		
	Company Name	Shareholder Name(s)	Received	Credit (£)	

Employment (PAYE)	Yes	No
<i>- If answer is "yes" could you please supply us with a COPIES of P45 or P60 and P11D where appropriate.</i>		

Social Security Benefits	e.g. job seekers, child benefit etc	Yes	No
<i>If answer is "yes" could you please provide the amounts received and dates.</i>			

Pension Income	Yes	No
<i>- If you received any "State" pension income , including lump sums, could you please provide a COPY any written confirmation you hold.</i>		
<i>- If you received pensions from any other source , could you please provide P60(s) / end of year summary</i>		

Other income						
Such as:	Sale of Assets	Yes	No	Any new self-employment	Yes	No
	Income from property	Yes	No		Any other income?	Yes
	<i>Where you have ticked "Yes" please send us further information.</i>					

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Did you make any of the following payments?.....

Do you pay into a pension?	Not via payroll	Yes	No												
<table border="1"> <thead> <tr> <th>Name of Pension Company</th> <th>Policy No.</th> <th>Amount Paid During Year (£)</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Name of Pension Company	Policy No.	Amount Paid During Year (£)											
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<i>Please supply COPY of confirmation of contributions from your Pension Company.</i>															

Gift Aid	Have you made any Gift Aid payments?	Yes	No									
<i>If the answer is "YES" could you please provide details.</i>												
<table border="1"> <thead> <tr> <th>Date</th> <th>Name of recipient</th> <th>Amount Paid During Year (£)</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Date	Name of recipient	Amount Paid During Year (£)								
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Student loan	Do you have an outstanding student loan	Yes	No
<i>If yes, please let us know what "plan" student loan, i.e. Plan 1 or 2</i>			

Finally, if you are due a refund...		
<i>Bank details for any refunds due</i>		
<i>Bank</i>	<i>Sort Code</i>	<i>Number</i>
Your Email Address		