

Kindly complete as much information as possible and contact us to finalize your tax matters.



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***INCOME TAX FINAL RETURN  
QUESTIONNAIRE - INDIVIDUALS***

***YEAR*** \_\_\_\_\_

***NAME*** : \_\_\_\_\_

**PIN: .....File No.....Zone.....**

**Address .....Code.....Town.....**

**Tel. ....Mob.....**

**Email address: .....**

**NOTE:** *It is important that you complete each and every of the sections (A to M) of this questionnaire. Please mark “N/A” on sections not applicable to you. Where space provided is inadequate, please attach schedules as necessary. Please remember to sign at the end. Thank you.*

	<u>Self</u>	<u>Wife</u>
- Surname	.....	.....
- Other name(s)	.....	.....
- PIN Number	.....	.....

**INCOME DETAILS**

**A. Employment income**

a) Please attach a certified copy of the tax deduction card (form P.9A) from your employer(s). For each source of employment income, please attach a listing showing the following details for self and wife

	<u>Self</u>	<u>Wife</u>
- employer’s name	.....	.....
- employer’s PIN	.....	.....
..		
- description of employment	.....	.....
- gross pay (excluding housing & fringe benefits)	.....	.....
- PAYE tax deducted	.....	.....

**b) Details of Directorship for Self and Wife**

Name of Company	% of Shareholding	Company’s PIN	Gross Remuneration	PAYE Deducted
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....
.....	.....	.....	.....	.....

c) Nature of non-cash benefits received (director or employee) and their cost details.

i) Free use of Company car. If yes please state :

- a) Model .....
- b) Make .....
- c) Rating cc .....
- d) Amount paid to your employer for personal use  
Kshs. ....
- e) Initial/acquisition cost to your employer .....

- ii) Electricity
- iii) Water
- iv) Furniture
- v) Telephone
- vi) Domestic Servant/cook
- vii) Night watchman
- viii) Day watchman
- ix) Gardener
- x) Radio/electric alarm system
- xi) Ayah
- xii) Other Benefits (give details)

Yes/No		Actual total cost to employer	
SELF	WIFE	SELF	WIFE

d) Do you have a loan advanced to you by your employer prior to 11 June 1998? .....

i) Has any of the terms of the loan(s) changed? Yes/No .....

If so, give details .....

.....

ii) Interest rate charged by the employer .....

iii) Repayment period: Date started .....

expected end date .....

iv) Loan Balance : Beginning of year .....

End of year .....

e) Was free housing provided during the year Yes/No

i) Period occupied if not full year .....

ii) Rent paid by your employer K£ .....

Are you a director of the company providing Housing and do you hold or control more than 5% of the issued shares? .....

iii) Rent paid to your employer K£ .....

iv) Do you reside on a "Plantation" or "Farm" under the terms of employment .....

**B. Pension Income**

	<u>Self</u>	<u>Wife</u>
- Source	.....	.....
- Is this from a registered fund (Yes/No)	.....	.....
- Gross pension received	.....	.....
- PAYE tax deducted	.....	.....

- Please attach the tax deduction cards or the tax certificate(s)

**C. Professional practice income**

	<u>Self</u>	<u>Wife</u>
- Profession	.....	.....
- Net income/(loss)	.....	.....
- VAT for the year	.....	.....

- Please attach accounts (balance sheet and profit and loss account) to support the net income/(loss) shown above.

**D. Farming income (self and wife)**

- Nature of farming	.....
- Net income/(loss)	.....

- Please attach accounts (as in C above).

E. **Rent income**

<u>L.R No. &amp; Location</u>	<u>Gross rents</u> <u>Shs.</u>	<u>Expenses</u> <u>Shs.</u>	<u>Net rent</u> <u>Shs .</u>
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

- Please attach detailed income and expenditure schedules.

F. **Details of Rental Property**

<u>L.R. No.</u>	<u>Year Purchased</u>	<u>Current tenants' name &amp; address</u>
.....	.....	.....
.....	.....	.....
.....	.....	.....

G. **Business income**

	<u>Self</u>	<u>Wife</u>
- Nature (description) of business	.....	.....
- Net income/(loss)	.....	.....
- VAT paid	.....	.....

- Please attach accounts (Balance Sheet and Profit and Loss Account).

H. **Partnership Income**

	<u>Self</u>	<u>Wife</u>
- Nature of partnership	.....	.....
- PIN No. of Partnership	.....	.....
- Nature of income (e.g. Business, Rent)	.....	.....
- Share of partnership profit/loss	.....	.....

- Please attach accounts Balance sheet and Profit and Loss account

I. **Other Income**

	<u>Self</u>	<u>Wife</u>
- Nature (description) of income generating activity	.....	.....
- Gross income	.....	.....

- Please attach a statement of income and expenditure.

**SUPPLEMENTARY INFORMATION**

J. **Mortgage Loan Interest**

- Lending institution	.....
- Interest paid during the year	.....

- Please attach the mortgage loan interest certificate.

K. **Home Ownership Savings Plan**

	<u>Self</u>	<u>Wife</u>
- Amount of contribution	.....	.....
- Name of the institution	.....	.....

- Attach supporting document(s)

L. **Motor Vehicles ( PSV and Commercial vehicles)-Lorries/Pickups/taxi**

<u>Reg. No</u>	<u>Type/ Make</u>	<u>Advance Tax paid</u>	<u>Date Purchased</u>	<u>Cost Shs.</u>	<u>Insurance Company and Branch</u>
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....
.....	.....	.....	.....	.....	.....

M. **House Rent Paid**

<u>Landlord's Full Name</u>	<u>ID No</u>	<u>PIN</u>	<u>P. O. Address Code &amp; Town</u>	<u>Gross rent paid</u>

N. **Bank Account**

Name of your Bank .....

Branch .....

Town .....

Account No. ....

Account Name .....

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please call us if you require any clarification and contact us to finalise your tax issues for the year.

**Motto: Maximise your tax savings and enhance tax compliance**