M Marsland
N Nash
A Associates

INFORMATION REQUIRED: CHILD BENEFIT CHARGE

M Marsland
N Nash
A Associates

CLIENT DETAILS

CLIENT NAME:

SPOUSE / CIVIL PARTNER / PARTNER

PLEASE NOTE

Reference to 'Partner' means Spouse, Civil Partner or Partner equivalent to a Spouse or Civil Partner.

QUESTIONS - ALL CASES

1) As of 7 January 2013 do you expect to be living in a household with a partner — Yes / No

2) If the answer to question 1 is yes, if we do not already have the information, please state in the box above, the name of your partner who is expected to be resident in your household as of 7 January 2013 — Yes / No

3) As of 7 January 2013 do you expect to have any children living in your household under the age of 18 — Yes / No

If yes, and we do not already have the information, please provide names and dates of birth

4) Do you or your partner claim Child Benefit — Yes / No

If yes please state who receives the benefit and the amount if known

5) Do you or your partner receive a financial contribution towards the upkeep of a child from a non household member who also receives child benefit — Yes / No

If yes please give the name of the person

QUESTIONS - ANSWERS NOT REQUIRED WHERE WE ALREADY COMPLETE TAX RETURN FOR YOUR PARTNER

6) Does your partner expect to receive taxable income over £50,000 in the tax year 2012/2013 (6 April 2012 to 5 April 2013)   (Salary, dividends, interest, pensions, rents etc) — Yes / No

7) Does your partner expect to receive taxable income over £60,000 in the tax year 2012/2013 (6 April 2012 to 5 April 2013)   (Salary, dividends, interest, pensions, rents etc) — Yes / No

8) Does your partner pay any pension contributions or make any gift aid payments — Yes / No

If yes please give an estimate of the amounts

Following receipt of the above information, we will be able to determine if you will be affected by the new legislation. We will contact you further in due course in respect of any further information needed, and thereafter if any appropriate action is required.