

# **P11D Questionnaire 2007/2008**

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

**PAYE SCHEME NO:** \_\_\_\_\_

**ACCOUNTS REFERENCE NO.** \_\_\_\_\_

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

Director/Employee\*  
\*Delete as appropriate

**NATIONAL INSURANCE NO:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

Please complete and return this questionnaire by no later than **16 May 2008**

To avoid penalties, P11D's must be submitted to HM Revenue and Customs by **6 July 2008**

Please answer all the questions even if you believe the information has already been supplied, this will enable us to submit the correct information to HM Revenue & Customs on time.

Benefits can be reported in several different sections of the P11D, depending on whom the contract is between.

The 3 situations are:

- 1** The contract is with the employee and provider, and the employer makes a payment on behalf of the employee direct to the provider.
- 2** The contract is with the employee and provider, and the employer reimburses the employee.
- 3** The contract is with the employer and provider, and the employer makes a payment on behalf of the employee direct to the provider.

## **1 - Company Car**

Does the company provide a company car for the director/employee?

**YES / NO**

If **YES**, and we do not already have this information, please complete the form on the back of this questionnaire

**Please provide a copy of the purchase invoice and vehicle registration document if available.**

## **2 - Company Car Mileage Allowances & Fuel**

Has the company paid mileage allowances or actual fuel costs to the director/employee using a company car?

**YES / NO**

If **YES**, please confirm the following:

**Business mileage** \_\_\_\_\_

**Mileage rate used** \_\_\_\_\_

**Amount paid** \_\_\_\_\_

£

VAT inclusive

How does the company reimburse the director/employee?  
\_\_\_\_\_

Has a company fuel card been provided to purchase fuel?

**YES / NO**

If **YES**, please confirm total cost of fuel purchased using the fuel card

£

VAT inclusive

Has the director/employee reimbursed the company for private mileage?

**YES / NO**

## **3 - Company Van**

Does the company provide a van for private use?

**YES / NO**

Is the van shared with other employee's?

**YES / NO**

If **YES to either**, please complete the form on the back of this questionnaire

**4 - Private Car Mileage Allowances & Fuel**

Has the company paid mileage allowances or actual fuel costs to the director/employee using a privately owned car? **YES / NO**

If **YES**, please confirm the following:

**Business mileage** \_\_\_\_\_

**Mileage rate used** \_\_\_\_\_

**Amount paid** £ \_\_\_\_\_

How does the company reimburse the director/employee? \_\_\_\_\_

Has a company fuel card been provided to purchase fuel? **YES / NO**

If **YES**, please confirm total cost of fuel purchased using the fuel card £ \_\_\_\_\_  
VAT inclusive

Has the director/employee reimbursed the company for private mileage? **YES / NO**

**5 - Motorcycles**

Does the company own a motorcycle? **YES / NO**

If **YES**, is the motorcycle available for private use? **YES / NO**

**6 - Payments For Use of Home Telephone**

Does the company meet, or reimburse any part of the director/employees home telephone bills? **YES / NO**

If **YES**, who is the contract between? (please refer to front page) **1 / 2 / 3**

Is there a separate business line? **YES / NO**

How much was met by the company or reimbursed to the director/employee? £ \_\_\_\_\_  
VAT inclusive

Does the above include line rental, private calls & internet connections? **YES / NO**

If **YES**, please provide a breakdown **Business Calls** £ \_\_\_\_\_  
VAT inclusive

**Private Calls** £ \_\_\_\_\_  
VAT inclusive

**Line Rental** £ \_\_\_\_\_  
VAT inclusive

**Please provide copies of telephone bills if available** **Internet Connection Charges** £ \_\_\_\_\_  
VAT inclusive

**7 - Mobile Telephones**

Does the company meet or reimburse any part of the director/employees mobile telephone bills? **YES / NO**

If **YES**, who is the contract between? (please refer to front page) **1 / 2 / 3**

How much was met by the company or reimbursed to the director/employee? £ \_\_\_\_\_  
VAT inclusive

Does the above include private calls & rental? **YES / NO**

If **YES**, please provide a breakdown of the calls & rental **Business Calls** £ \_\_\_\_\_  
VAT inclusive

**Private Calls** £ \_\_\_\_\_  
VAT inclusive

**Please provide copies of telephone bills if available** **Line Rental** £ \_\_\_\_\_  
VAT inclusive

**8 - Private Medical Insurance**

Does the company pay premiums for private medical insurance, permanent health insurance or life assurance?

YES / NO

If YES, who is the contract between? (please refer to front page)

1 / 2 / 3

Please confirm who the named beneficiary of the policy is:

<u>Date Paid</u>	<u>Type of Policy</u>	<u>Provider of Benefit</u>	<u>Premium (Per Month/Year)</u>
_____	_____	_____	£ _____ VAT inclusive
_____	_____	_____	£ _____ VAT inclusive

**9 - Subscriptions & Professional Fees**

Does the company pay subscriptions or professional fees e.g. subscriptions to leisure, sports or health clubs, magazines & periodicals, or professional subscriptions & accountancy fees?

YES / NO

If YES, who is the contract between? (please refer to front page)

1 / 2 / 3

<u>Date Paid</u>	<u>Type of Subscription/Fee</u>	<u>Provider of Benefit</u>	<u>Premium (Per Month/Year)</u>
_____	_____	_____	£ _____ VAT inclusive
_____	_____	_____	£ _____ VAT inclusive

**10 - 'Non' Credit Card Expenses Payments**

Have any expenses payments been made to, or on behalf of, the director/employee?

YES / NO

If YES, please complete the form on the back of the questionnaire

**11 - Credit Card Expenses Payments**

Has the director/employee made a purchase using the credit card?

YES / NO

If YES, please complete the form on the back of the questionnaire

Has the director/employee made a purchase using the credit card for personal items?

YES / NO

If YES, has the director/employee repaid the company for personal items purchased?

YES / NO

If No, please provide amount of personal items purchased.

£ \_\_\_\_\_

**12 - Living Accommodation**

Does the company provide living accommodation for the director/employee?

YES / NO

If YES, what is the cost of accommodation (including the cost of improvements)?

£ \_\_\_\_\_

What payments have been made by director/employee towards the cost or for the grant of tenancy?

£ \_\_\_\_\_

If the accommodation was provided for part of the tax year, what are the number of days provided?

\_\_\_\_\_

How much rent is paid by the director/employee for the accommodation, if any?

£ \_\_\_\_\_

Please confirm the full address of accommodation

\_\_\_\_\_  
\_\_\_\_\_

**13 - Interest-free & Low Interest Loans**

Has the company provided a beneficial loan to the director/employee, including directors overdrawn account? YES / NO

(if the total amount outstanding on all non-qualifying loans does not exceed £5,000 at any time in the year, there is no benefit).

If **YES**, the maximum balance outstanding at any time in the year £ \_\_\_\_\_

The maximum balance on later of day loan was taken out or at 6 April 2006 £ \_\_\_\_\_

The maximum balance on earlier of day loan was discharged or at 5 April 2007 £ \_\_\_\_\_

Amount of interest paid for 2006/2007 if any £ \_\_\_\_\_

**14 - Assets Transferred**

Have any of the company's assets been transferred (cars, computers, etc) to the director/employee as a gift or sale less than the market value? YES / NO

If **YES**, what is the cost/market value of the asset £ \_\_\_\_\_

The amount paid by director/employee £ \_\_\_\_\_

**15 - Assets Placed at the Employee's Disposal**

Has the company provided assets to the director/employee for private use? YES / NO

If **YES**, please provide details \_\_\_\_\_

**16 - Working From Home**

Has the company reimbursed the director/employee expenses for use of home as an office? YES / NO

If <b>YES</b> , please provide the amounts paid for the following	<b>Electricity and Gas charges</b>	£ _____	<small>VAT inclusive</small>
	<b>Contents insurance</b>	£ _____	<small>VAT inclusive</small>
	<b>Council Tax charges</b>	£ _____	<small>VAT inclusive</small>
	<b>Rent paid (if any)</b>	£ _____	

**17 - Other**

If you have been provided with any other benefits or expenses, please give details below  
\_\_\_\_\_  
\_\_\_\_\_

**18 - Declaration**

I certify that this P11D questionnaire has been completed to the best of my knowledge and I understand that the information provided will be used for the completion of forms P11D/P9D.

Signed \_\_\_\_\_

Position \_\_\_\_\_

Date \_\_\_\_\_

## **P11D Car Questionnaire 2007/2008**

Cars provided for private use to an employee or director

Company Name	
Employee or Director's Name	
Employee or Director's National Insurance Number	
Exact Details of Make and Model	
Registration Number	
Transmission	
Engine Size	CC
Date First Registered <sup>1</sup>	
Fuel Type <sup>2</sup>	
Carbon Dioxide (CO <sub>2</sub> ) Emissions	grams of CO <sub>2</sub> per kilometre

1 - If the car was first registered on or after **1 January 1998**, give the **approved** CO<sub>2</sub> emissions at the date of first registration

2 - If the fuel type is **Diesel**, please specify whether it is **Euro IV** compliant

List price of the car at the date of first registration	£	VAT inclusive
Price of accessories not included in the price of the car	£	VAT inclusive
Date the car was made available to the employee	From	To
Capital contribution made by the employee towards the cost of the car and for accessories	£	
Is fuel for private use provided with this car?	<b>YES / NO</b>	
If yes, does the employee reimburse all private fuel used	<b>YES / NO</b>	

## **P11D Van Questionnaire 2007/2008**

Vans provided to an employee/director for private use in addition to business use and ordinary commuting.

**To be completed only if the following examples apply:-**

- 1 - The van is used to do supermarket shopping every week.
- 2 - The van is taken away and used on holiday.
- 3 - The van is used outside of work for social activities.

Company Name	
Employee or Director's Name	
Employee or Director's National Insurance Number	
Registration Number	
Date First Registered	
Date the van was made available to the employee	From To
Name of employee who the van is shared with	
Date the van was shared	From To
Percentage of sharing between employee's	
Is fuel for private use provided with this van?	<b>YES / NO</b>
If yes, does the employee reimburse all private fuel used	<b>YES / NO</b>

## **P11D Expenses Questionnaire 2007/2008**

Expenses provided to an employee or director.

Company Name	
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Employee or Director's Name	
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Employee or Director's National Insurance Number	
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**Non Credit Card**

**Credit Card**

VAT inclusive

VAT inclusive

Accommodation	£	£
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Advertising	£	£
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Car Maintenance	£	£
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Computer Equipment	£	£
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Entertainment - Client	£	£
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Entertainment - Staff	£	£
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Other (please specify)	£	£
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Office Equipment	£	£
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Petrol	£	£
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Postage	£	£
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Relocation Expenses (exceeding £8,000)	£	£
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Travel & Subsistence	£	£
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**I confirm that all expenses detailed above were incurred wholly, exclusively and necessarily in the performance of the duties of my employment.**

YES / NO
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**If NO, please specify below**

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