

Residency and Domicile Status

We need to determine your tax residency status in order to provide accurate tax planning and ensure all income is treated and taxed correctly on your personal tax return (self-assessment). Please complete the following questionnaire which we will hold on your records.

Please note: Depending on your residency status, we may ask you to complete the questionnaire on an annual basis.

- | | | | |
|----|-------------------------------------------|-----|----|
| 1. | Were you born in the UK? | Yes | No |
| 2. | Have you lived in the UK your whole life? | Yes | No |

Key Definitions

Tax Year: 6th April in one year to the 5th April in the following year.

Day: if you are in the UK at midnight that day counts as a day in the UK (other days may be counted in some circumstances). Days in the UK can be ignored in some exceptional circumstances.

Working: you work in the UK on a day if you work 3 hours' or more in the UK on that day.

Full-time work: 35 hours per week (average).

Accommodation: a place to live – can include a holiday or weekend home or a hotel room (where stay of one night or more) or a relative's home (if you stay with a relative for 16 nights or more in the tax year).

Home: does not include somewhere that a person only uses periodically, like a holiday home or temporary retreat; or any property being advertised for sale or let where the individual lives somewhere else.

Visits: an individual visits a home of his on a day if he spends any time there (however short).

Domicile: the country that a person treats as their permanent home, lives in or has a substantial connection with.

Full Name:

Tax Year:

Accountant:



Business Partner



Country of birth:

What country would you consider your domicile to be?

Date of arrival/leaving:

1. I was not a UK resident in all 3 previous tax years & fewer than 46 days in the UK in the current tax year?

Yes No

2. I was a UK resident in one or more of the 3 previous tax years & fewer than 16 days in the UK in the current tax year?

Yes No

3. Have you worked abroad full-time with fewer than 91 days in the UK and of those fewer than 31 days working in the UK in the current tax year?

Yes No

4. Have you been in the UK for more than 183 days in the current tax year?

Yes No

5. Is your only home in the UK and did you visit that home in the current tax year on 30 days or more?

Yes No

6. Have you worked in the UK full-time and more than 75% of working days are in the UK?

Yes No

7. Please specify the total number of days that you have been/intend to be in the UK for in the current tax year.

_____ Days

8. Do you have any family ties to the UK? E.g spouse, civil partner, minor child.

Yes No

9. Do you have an accommodation tie to the UK? E.g long stay hotel room, house,



Business Partner



holiday home, relatives house.

Yes No

If yes, please provide details _____

10. How long was/is this accommodation available for during the current tax year?

_____ Days _____ nights

11. How many days/hours do you intend to work in the UK for in the current tax year?

_____ Days _____ Hours per day

12. Have you spent 90 days or more in the UK in either of the two previous tax years?

Yes No

Please can you confirm your intentions, for example how long you plan to stay in/out of the UK:

Declaration: I can confirm that the above questionnaire is completed to the best of my knowledge.

Signature:.....

Date:.....

