

Quick Tax Quiz for Individuals

Click to answer
Yes No N/a

1

Have you made the most of your opportunities to save tax by investing in a personal pension?

 Yes No N/a

2

Have you applied for Working or Children's Tax Credits? Depending on circumstances you could, for example, be eligible if your income is below £26,000 with one child.

 Yes No N/a

3

If you give money to charity, have you made sure that the taxman makes your donation even bigger by using covenants and the Gift Aid Scheme?

 Yes No N/a

4

Have you considered investments that give you a tax free return? For example: ISAs, National Savings Certificates and Friendly Societies.

 Yes No N/a

5

Have you applied for the Transferable Marriage Allowance if you (or your spouse) are a basic rate taxpayer whilst your spouse (or you) does not pay tax?

 Yes No N/a

6

If your spouse pays tax at a lower rate than you, have you considered passing some of your investments to them in order to reduce your combined tax bills?

 Yes No N/a

7

If some of your investments have done well and grown in value have you considered whether selling some of them would save you higher tax bills in the future?

 Yes No N/a

If you have answered 'No' to any of these questions then you are possibly paying too much tax

The more 'No' answers, the greater the potential tax saving

Click the button below to return your Quick Tax Quiz answers by email, include your name and telephone number and we will contact you for a no-obligation chat to see how we can start saving you tax

Help me save tax!