

If the address in this box is wrong, please change it. If no address is shown please enter your correct details

Your reference
Tax reference

Year to:

Returning your Tax Repayment Form

Please fill in this form with details of your income for the above tax year. The enclosed Notes will help you (but there is not a note for every box on the form). If you need more help with anything on the Tax Repayment Form, please contact us on the phone number above.

If you are not UK resident do not use this form; please contact us.

Please do not send us any personal records, or tax certificates or vouchers with your form.

Please allow four weeks before contacting us about your repayment. We will make it as quickly as possible.

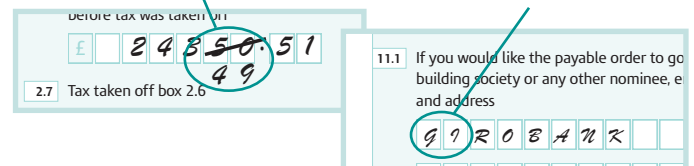
How to fill in this form

This form is designed to be read by machine - please follow the completion instructions so that it may be read correctly:

- write inside the boxes, using black ink and capital letters
- if you make a mistake, cross it out and write the correct information below it
- leave blank any boxes or sections that do not apply to you - please do not strike through them.

Cross out any mistakes and write the correct information below

Use black ink and capital letters



Personal details

If you are claiming repayment for somebody else, please enter **their** personal details in boxes 1.1 and 1.2

<p>1.1 Date of birth</p> <table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;">D</td><td style="width: 20px;">D</td> <td style="width: 20px;">M</td><td style="width: 20px;">M</td> <td style="width: 20px;">Y</td><td style="width: 20px;">Y</td> <td style="width: 20px;">Y</td><td style="width: 20px;">Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y	<p>1.5 Capital gains - If you made a taxable capital gain, or a loss, put 'X' in the box, read page 1 of the Notes and enclose your computations and form R40(CG)</p> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px auto;"></div>				
D	D	M	M	Y	Y	Y	Y						
<p>1.2 National Insurance number</p> <table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td> </tr> </table>											<p>1.6 If this is an interim claim and you expect to receive more income before the end (5 April) of the above tax year, put 'X' in the box</p> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px auto;"></div>		
<p>1.3 Name and address - if it is different from above. Please write the correct details underneath the wrong ones, and put 'X' in the box</p> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px auto;"></div>	<p>1.7 If this is your first claim on behalf of somebody else, put 'X' in the box</p> <div style="border: 1px solid black; width: 20px; height: 20px; margin: 5px auto;"></div>												
<p>1.4 Your contact phone number</p> <table border="1" style="border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td> <td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td> </tr> </table>													

UK employment income, pensions and state benefits

<p>2.1 Total pay from all employments, before tax taken off (from P60/P45)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.2 Tax taken off box 2.1 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.3 State pension - enter the amount for the year (not the weekly, or 4 weekly, amount). <i>Do not include Attendance Allowance, Disability Living Allowance or Pension credits</i></p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.4 Total of other taxable state benefits</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>2.5 Tax taken off any Taxable Incapacity Benefit included in box 2.4</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.6 Total of other pensions and retirement annuities, before tax was taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.7 Tax taken off box 2.6</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
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UK interest and dividends

With joint accounts, only enter **your share**.

<p>3.1 Net interest paid by banks or building societies etc. - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.2 Tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.3 Gross amount - the amount before it was taxed</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.4 If you get interest that has not been taxed at all, put the total in this box, not in box 3.3</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>3.5 UK company dividends (but do not add on the tax credit)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.6 Dividends from authorised unit trusts and open-ended investment companies (but do not add on the tax credit)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.7 Stock dividends - enter the appropriate amount in cash/ cash equivalent of the share capital - without any tax</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
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Trust, settlement and estate income

<p>4.1 Gross income taxed at trust rate</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.2 Tax paid or tax credit on box 4.1 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.3 Gross income taxed at basic rate</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.4 Tax paid or tax credit on box 4.3 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>4.5 Gross income taxed at lower rate</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.6 Tax paid or tax credit on box 4.5 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.7 Income at dividend ordinary rate</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.8 Tax paid or tax credit on box 4.7 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
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UK land and property

5.1	Income	£	<input type="text"/>	•	<input type="text"/>
5.2	Expenses allowable for tax	£	<input type="text"/>	•	<input type="text"/>
5.3	Profit	£	<input type="text"/>	•	<input type="text"/>
5.4	Loss	£	<input type="text"/>	•	<input type="text"/>
5.5	Land and property losses brought forward from earlier years	£	<input type="text"/>	•	<input type="text"/>

Foreign income

Please enter the sterling equivalent of your foreign income and tax paid.

6.1	Foreign dividends (net amount)	£	<input type="text"/>	•	<input type="text"/>							
6.2	Foreign tax taken off box 6.1 income	£	<input type="text"/>	•	<input type="text"/>							
6.3	Foreign property income - before expenses	£	<input type="text"/>	•	<input type="text"/>							
6.4	Expenses allowable for tax	£	<input type="text"/>	•	<input type="text"/>							
6.5	Foreign tax taken off box 6.3 income	£	<input type="text"/>	•	<input type="text"/>							
6.6	Foreign interest and other savings	£	<input type="text"/>	•	<input type="text"/>							
6.7	Foreign tax taken off box 6.6 income	£	<input type="text"/>	•	<input type="text"/>							
6.8	Foreign pensions and any other foreign income	£	<input type="text"/>	•	<input type="text"/>							
6.9	Foreign tax taken off box 6.8 income	£	<input type="text"/>	•	<input type="text"/>							
6.10	Country of origin	<input type="text"/>										

Any other income and benefits

7.1	Chargeable event gains	£	<input type="text"/>	•	<input type="text"/>							
7.2	Number of years	<input type="text"/>										
7.3	Tax treated as paid on box 7.1 income	£	<input type="text"/>	•	<input type="text"/>							
7.4	Other income and benefits	£	<input type="text"/>	•	<input type="text"/>							
7.5	Tax taken off box 7.4	£	<input type="text"/>	•	<input type="text"/>							
7.6	Description of box 7.4 income etc.	<input type="text"/>										

Gift Aid

8.1	Gift Aid payments made in the year of claim	£	<input type="text"/>	•	<input type="text"/>
8.2	Gift Aid payments made in the year of claim but treated as if made in the preceding year	£	<input type="text"/>	•	<input type="text"/>
8.3	Total of any 'one-off' payments included in box 8.1	£	<input type="text"/>	•	<input type="text"/>
8.4	Gift Aid payments made after the end of the year of claim but to be treated as if made in that year	£	<input type="text"/>	•	<input type="text"/>

Blind person's allowance

9.1 If you are registered blind on a local authority, or other, register put 'X' in the box

Please also consider box 10.6 below

9.2 Enter the name of the local authority, or other, register (or 'Scotland' or 'Northern Ireland' as appropriate)

Married couple's allowance

This allowance is only due if you, or your spouse or civil partner, were born **before 6 April 1935**. Read page 10 of the Notes.

10.1 To claim the full allowance, enter your spouse's or civil partner's first name

10.2 If, as a couple, you have already asked us to give all of the minimum amount to your spouse or civil partner, put 'X' in the box

10.3 If you have already agreed that half of the minimum amount is to go to your spouse or civil partner, put 'X' in the box

10.4 Your spouse or civil partner's date of birth if older than you and you filled in boxes 10.1, 10.2 or 10.3

10.5 If you married or formed a civil partnership in the year of claim, enter the date of the marriage or civil partnership

10.6 Any unused married couple's, or blind person's, allowance can be transferred from one spouse or civil partner to the other - if you want a form to do this, put 'X' in the box

Repayment instructions

11.1 If you would like the payable order to go to your bank, building society or any other nominee, enter their name and address

11.2 If your nominee is your adviser enter their reference

If the payable order is to be sent to your bank or building society fill in boxes 11.3 to 11.6

11.3 Branch sort code

 - -

11.4 Account number

11.5 Building society reference number

11.6 Name of account holder

Declaration etc.

12.1 To the best of my knowledge and belief, the details given in this form are correct and complete and I claim the repayment due. *If you have asked us to send the repayment to a nominee, your signature will be our authority to pay that person*

12.2 If you have signed on behalf of someone else, enter the capacity, for example, executor, receiver, attorney

12.3 Date