

1.3 Name and address - if it is different from above. Please

put 'X' in the box

1.4 Your contact phone number

write the correct details underneath the wrong ones, and

Claim for repayment of tax deducted from savings and investments

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,

1.7 If this is your first claim on behalf of somebody else,

put 'X' in the box

put 'X' in the box

	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:	5 April	
How to	fill in this form	
above tax ye not a note for with anythin number above. If you are no contact us. Please do not certificates of Please allow	ot a UK resident do not use this form; please ot send us any personal records, or tax or vouchers with your form. four weeks before contacting us about your Ne will pay you as quickly as possible.	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 Use black ink and capital letters Deforme tax was taken off box 2.7 4 9 11.1 If you would like the payable order to go building society or any other nominee. Gaddress and postcode GIROBANK
1.1 Date o	f birth <i>DD MM YYYY</i>	1.5 Capital Gains - If you need to fill in a form for Capital Gains,
	al Insurance number	put 'X' in the box. Pages 1 and 2 of the R40 Notes will help you to decide if you need to do this

UK employment income, pensions and state benefits 2.1 Total pay from all employments, before tax taken off 2.5 Total of other taxable state benefits (from P60/P45) £ 2.6 Tax taken off any taxable Incapacity Benefit included 2.2 Tax taken off box 2.1 income in box 2.5 £ £ 2.3 State pension - enter the amount for the year (not the Total of other pensions and retirement annuities, weekly, or 4 weekly, amount). Do not include Attendance before tax was taken off Allowance, Disability Living Allowance or Pension credits £ 2.8 Tax taken off box 2.7 2.4 If you do not receive State pension, put 'X' in the box UK interest and dividends With joint accounts, only enter your share of the interest received. 3.1 Net interest paid by banks, building societies, UK authorised 3.5 UK company dividends (but do not add on the tax credit) unit trusts or open-ended investment companies etc. - after tax taken off Dividends from UK authorised unit trusts and open-ended investment companies (but do not add on the tax credit) 3.2 Tax taken off £ 3.7 Stock dividends - enter the appropriate amount in cash/ 3.3 Gross amount - the amount before tax taken off cash equivalent of the share capital - without any tax 3.4 If you get interest that has not been taxed at all, put the total in this box, not in box 3.3 Trust, settlement and estate income 4.1 Net amount taxed at trust rate - after tax taken off 4.6 Tax paid or tax credit on box 4.5 income 4.2 Tax paid or tax credit on box 4.1 income Net amount of dividend income 4.3 Net amount of non-savings income - after tax taken off 4.8 Tax credit on box 4.7 income £

4.4 Tax paid or tax credit on box 4.3 income

4.5 Net amount of savings income - after tax taken off

4.9 Income payments from settlor-interested trusts

4.10 Income taxed at 22% - after tax taken off

UK land and property	
5.1 Income	5.4 Loss
£ ·	£
5.2 Expenses allowable for tax	5.5 Land and property losses brought forward from
£ ·	earlier years £
5.3 Profit	
£	
Foreign income	
Please enter the sterling equivalent of your foreign inco	me and tax paid.
6.1 Foreign dividends (net amount)	6.7 Foreign tax taken off box 6.5 income
£ ·	£ ·
6.2 Foreign tax taken off box 6.1 income	6.8 Foreign interest and other savings
£ ·	£ ·
6.3 Foreign dividends eligible for tax credit (net amount)	6.9 Foreign tax taken off box 6.8 income
£ ·	£ ·
6.4 Foreign tax taken off box 6.3 income	6.10 Foreign pensions and any other foreign income
£ ·	£ ·
6.5 Foreign property income - before expenses	6.11 Foreign tax taken off box 6.10 income
£ · ·	£ · ·
6.6 Foreign property - expenses allowable for tax	6.12 Country of origin
£ · ·	
Any other income and benefits	
7.1 Chargeable event gains	7.4 Other income and benefits (gross amount)
£ ·	£ ·
7.2 Number of years	7.5 Tax taken off box 7.4
	£ ·
7.3 Tax treated as paid on box 7.1 income	7.6 Description of box 7.4 income, etc.
£	
Gift Aid	
8.1 Gift Aid payments made in the year of claim	8.3 Total of any 'one-off' payments included in box 8.1
£ ·	£ · ·
8.2 Gift Aid payments made in the year of claim but	8.4 Gift Aid payments made after the end of the year of
treated as if made in the preceding year	claim but to be treated as if made in that year

Blin	d person's allowance					
9.1	If you are registered blind on a local authority, or other register, put 'X' in the box		Enter the name of the local authority, or other, register (or 'Scotland' or 'Northern Ireland' as appropriate)			
	Please also consider box 10.6 below					
Married couple's allowance						
	This allowance is only due if you, or your spouse or civil par	rtner, w	ere born before 6 April 1935 . Read page 11 of the Notes.			
10.1	To claim the full allowance, enter your spouse's or civil partner's first name	10.4	Your spouse's or civil partner's date of birth if older than you and you filled in boxes 10.1, 10.2 or 10.3 DD MM YYYY			
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	10.5	If you married or formed a civil partnership in the year of claim, enter the date of the marriage or civil partnership DD MM YYYY			
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	10.6	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,		If the payable order is to be sent to your bank or building society, fill in boxes 11.3 to 11.5			
	address and postcode	11.3	Branch sort code			
		11.4	Account number			
		11.4				
		11.5	Name of account holder			
11.2	If your nominee is your adviser enter their reference					
Dec	laration					
12.1	Please sign and date this form and then print your full name in	n the sp	ace provided			
	The information I have given on this form is correct and complete to the best of my knowledge					
	Signature Date Date					
	Your name					
12.2	If you have signed on behalf of someone else, enter the capacity, for example, executor, receiver, attorney		y, please send us your completed form in the ope provided			