



# Claim for repayment of tax deducted from savings and investments

If not already shown, please enter your name and address  
in this box to make sure that we can deal with your claim

Your reference  
Tax reference

Year to: 5 April

## How to fill in this form

Please fill in this form with details of your income for the  
above tax year. The enclosed R40 Notes will help you (but  
there's not a note for every box on the form).

If you're not a UK resident, complete form R43.

Do not send us any personal records, or tax certificates or  
vouchers with your form. We'll contact you if we need these.

Please allow 4 weeks before contacting us about your  
repayment. We'll pay you as quickly as possible.

Remember to:

- 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 -  
do not cross through them

Cross out any mistakes and write the  
correct information below

Use black ink and capital letters

2.7	Total of other pensions and retirement annuities before tax taken off	£ 24850.51
2.8	Tax taken off box 2.7	49
11.2	If you would like the payable order to go to you please enter in full the name, address and post	
	SMITH	

## Personal details

<b>1.1</b> Date of birth DD MM YYYY <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<b>1.5</b> Your agent's name <input type="text"/>
<b>1.2</b> National Insurance number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<b>1.6</b> Your agent's address <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>1.3</b> Name and address - if it's different from above. Write the correct details underneath the wrong ones. New address effective from <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<b>1.7</b> Your agent's phone number <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>1.4</b> Your contact phone number and best time to call Your phone number <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Best time to call <input type="text"/>	<b>1.8</b> 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 <input type="checkbox"/>

2.1	Total pay from all employments, before tax taken off (from P60/P45)	£ <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"/>
2.2	Tax taken off box 2.1 income	£ <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"/>
2.3	State Pension - enter the amount you were entitled to receive in the year not the weekly or 4 weekly amount. Read the R40 notes	£ <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"/>
2.4	If you do not receive State Pension, put 'X' in the box <input type="text"/>	
2.5	Total of other taxable state benefits	£ <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"/>
2.6	Tax taken off any taxable Incapacity Benefit included in box 2.5	£ <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"/>
2.7	Total of other pensions and retirement annuities, before tax taken off	£ <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"/>
2.8	Tax taken off box 2.7	£ <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"/>
2.9	Flat rate expenses, professional subscriptions, etc	£ <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"/>

With joint accounts, only enter your share of the interest received.

<b>3.1</b>	Net interest paid by banks, building societies etc, purchased life annuities and PPI payments - after tax taken off <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>	<b>3.5</b>	UK company dividends (but do not add on the tax credit) <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>
<b>3.2</b>	Tax taken off <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>	<b>3.6</b>	Dividends from UK authorised unit trusts, open-ended investment companies and investment trusts (but do not add on the tax credit) <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>
<b>3.3</b>	Gross amount - the amount before tax taken off <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>	<b>3.7</b>	Stock dividends - enter the appropriate amount in cash/cash equivalent of the share capital - without any tax <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>
<b>3.4</b>	Untaxed interest not included in box 3.3 (if you have more than one account - read the R40 notes for boxes 3.1 to 3.7) <div>£ <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/> . <input type="text"/><input type="text"/></div>		

<p><b>4.1</b> Unique Taxpayer Reference (UTR) of the trust</p> <div> <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"/> </div>	<p><b>4.7</b> Tax paid on box 4.6 income</p> <div>           £            <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"/> </div>
<p><b>4.2</b> Net amount taxed at trust rate - after tax taken off</p> <div>           £            <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"/> </div>	<p><b>4.8</b> Net amount of dividend income</p> <div>           £            <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"/> </div>
<p><b>4.3</b> Tax paid on box 4.2 income</p> <div>           £            <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"/> </div>	<p><b>4.9</b> Tax credit on box 4.8 income</p> <div>           £            <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"/> </div>
<p><b>4.4</b> Net amount of non-savings income - after tax taken off</p> <div>           £            <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"/> </div>	<p><b>4.10</b> Income payments from settlor-interested trusts</p> <div>           £            <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"/> </div>
<p><b>4.5</b> Tax paid or tax credit on box 4.4 income</p> <div>           £            <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"/> </div>	<p><b>4.11</b> Net amount of dividend income - after tax taken off</p> <div>           £            <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"/> </div>
<p><b>4.6</b> Net amount of savings income - after tax taken off</p> <div>           £            <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"/> </div>	<p><b>4.12</b> Tax paid on box 4.11 income</p> <div>           £            <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"/> </div>

<p><b>5.1</b> 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"/></p> <p><b>5.2</b> Expenses allowable for 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"/></p> <p><b>5.3</b> Profit</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"/></p>	<p><b>5.4</b> Loss</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"/></p> <p><b>5.5</b> Land and property losses brought forward from earlier years</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"/></p>
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[illegible][illegible]

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

## Blind Person's Allowance

<b>9.1</b> If you're registered blind (severely sight impaired) with a local authority, or other register, put 'X' in the box <input type="checkbox"/>  Please also consider box 10.6 below	<b>9.2</b> Enter the name of the local authority, or other register (or 'Scotland' or 'Northern Ireland', as appropriate) <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																																

## Married Couple's Allowance

This allowance is only due if you, or your spouse or civil partner, were born before 6 April 1935.

<b>10.1</b> To claim the full allowance, enter your spouse's or civil partner's full name <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																																	<b>10.5</b> Enter the date of the marriage or civil partnership DD MM YYYY <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>								
<b>10.2</b> If, as a couple, you've already asked us to give all of the minimum amount to your spouse or civil partner, put 'X' in the box <input type="checkbox"/>	<b>10.6</b> 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 us to send you a form to do this, put 'X' in the box <input type="checkbox"/> or you can download it from <a href="http://www.gov.uk/government/publications/income-tax-notice-of-transfer-of-surplus-income-tax-allowances-575t">www.gov.uk/government/publications/income-tax-notice-of-transfer-of-surplus-income-tax-allowances-575t</a> and attach it to this claim form.																																								
<b>10.3</b> If you've already agreed that half of the minimum amount is to go to your spouse or civil partner, put 'X' in the box <input type="checkbox"/>																																									
<b>10.4</b> 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 <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																																									

## Repayment instructions

<b>11.1</b> Where should we send the repayment to?  Your address <input type="checkbox"/>  Your nominee's address (go to question 11.2 to 11.3) <input type="checkbox"/>	<b>11.2</b> If you would like the payable order to go to your nominee, enter in full the name, address and postcode <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																																																																																
	<b>11.3</b> If your nominee is your adviser, enter their reference <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																																																																																

## Declaration - Please make sure that you've read the R40 Notes at section 12.2 before signing

<b>12.1</b> Sign and date this form and then write your full name (in capital letters) in the space provided <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"><p>The information I've given on this form is correct and complete to the best of my knowledge.</p><p>Signature <span style="float: right;">Date <table border="1" style="display: inline-table;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table></span></p><p>Name and title in capital letters</p></div>																	
<b>12.2</b> If you've signed on behalf of someone else, enter the capacity, for example, parent, executor, receiver, attorney <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td><td style="width: 20px; height: 20px;"></td></tr></table>																	<b>12.3</b> Tick this box if you do not need a claim form in future <input type="checkbox"/>