

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

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 ann				
before tax taken off £ 2 4 8 5 0 5 1	11.2 If you would like the payable order to go to yo please enter in full the name, address and post			
2.8 Tax taken off box 2.49	SMITH			

Personal details

1.1 Date of birth DD MM YYYY	1.5 Your agent's name
1.2 National Insurance number	1.6 Your agent's address
1.3 Name and address - if it's different from above.	
Write the correct details underneath the wrong ones.	
New address effective from	
	1.7 Your agent's phone number
Your contact phone number and best time to call	
Your phone number	
	1.8 If this is an interim claim and you expect to receive more income before the end (5 April) of the above tax year,
Best time to call	put 'X' in the box

UK employment income, pensions and state benefits			
2.1 2.2 2.3 2.4 2.5	Total pay from all employments, before tax taken off (from P60/P45) £ Tax taken off box 2.1 income £ State Pension - enter the amount you were entitled to receive in the year not the weekly or 4 weekly amount. Read the R40 notes £ If you do not receive State Pension, put 'X' in the box Total of other taxable state benefits £	2.6	Tax taken off any taxable Incapacity Benefit included in box 2.5 £ Total of other pensions and retirement annuities, before tax taken off £ Tax taken off box 2.7 £ Flat rate expenses, professional subscriptions, etc
UK i	nterest and dividends		
3.1	With joint accounts, only enter your share of the interest reserved. Net interest paid by banks, building societies etc, purchased life annuities and PPI payments - after tax taken off f Tax taken off Gross amount - the amount before tax taken off 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)	3.5 3.6 3.7	UK company dividends (but do not add on the tax credit) £ Dividends from UK authorised unit trusts, open-ended investment companies and investment trusts (but do not add on the tax credit) £ Stock dividends - enter the appropriate amount in cash/cash equivalent of the share capital - without any tax
Trus	st, settlement and estate income		
4.1	Unique Taxpayer Reference (UTR) of the trust Net amount taxed at trust rate - after tax taken off	4.8	Tax paid on box 4.6 income £ Net amount of dividend income £
4.4	Tax paid on box 4.2 income f Net amount of non-savings income – after tax taken off	4.10	Tax credit on box 4.8 income f Income payments from settlor-interested trusts
4.5	Tax paid or tax credit on box 4.4 income	4.11	Net amount of dividend income – after tax taken off
4.6	Net amount of savings income - after tax taken off	4.12	Tax paid on box 4.11 income

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UK I	and 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 •		
Fore	eign income		
	Enter the sterling equivalent of your foreign income and tag give the additional details on a separate sheet. Enter foreign If you're a non-resident landlord, then foreign interest and fo	n divid	ends of £300 or less.
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
	f		£ • • • • • • • • • • • • • • • • • • •
6.4	Foreign tax taken off box 6.3 income	6.10	Foreign pensions and any other foreign income
	£ • • •		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
	£ ·		
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
	£		£

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Blin	d Person's Allowance			
9.1	If you're registered blind (severely sight impaired) with a local authority, or other register, put 'X' in the box	9.2	Enter the name of the local authority, or other register (or 'Scotland' or 'Northern Ireland', as appropriate)	
	Please also consider box 10.6 below			
Mar	ried Couple's Allowance			
	This allowance is only due if you, or your spouse or civil p	artner, w	vere born before 6 April 1935.	
10.1	To claim the full allowance, enter your spouse's or civil partner's full name	10.5	Enter the date of the marriage or civil partnership DD MM YYYY	
		10.6	Any unused Married Couple's, or Blind Person's Allowance can be transferred from one spouse	
10.2	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		or civil partner to the other - if you want us to send you a form to do this, put 'X' in the box or you can download it from	
10.3	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		www.gov.uk/government/publications/income-tax-notice- of-transfer-of-surplus-income-tax-allowances-575t and attach it to this claim form.	
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			
Rep	ayment instructions			
11.1	Where should we send the repayment to?	11.2	If you would like the payable order to go to your nominee, enter in full the name, address and postcode	
	Your address		enter in rati the hame, address and postedae	
	Your nominee's address (go to question 11.2 to 11.3)			
		11.3	If your nominee is your adviser, enter their reference	
Dec	laration - Please make sure that you've rea	d the I	R40 Notes at section 12.2 before signing	
12.1	Sign and date this form and then write your full name (in cap	oital lette	rs) in the space provided	
	The information I've given on this form is correct and com	plete to t	he best of my knowledge.	
	Signature		Date Date	
	Name and title in capital letters			
12.2	If you've signed on behalf of someone else, enter the capacity, for example, parent, executor, receiver, attorney	12.3	Tick this box if you do not need a claim form in future	

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