HM Revenue & Customs

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.

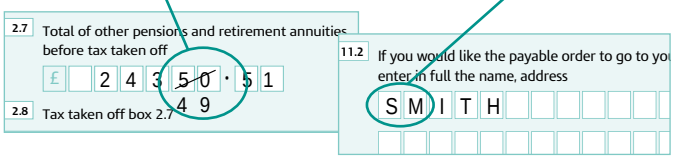
Please allow 4 weeks before contacting us about your repayment. We'll pay you as quickly as possible.

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



Personal details

1.1 Date of birth DD MM YYYY

1.2 National Insurance number

1.3 Name and address - if it's different from above.
Write the correct details underneath the wrong ones.
New address effective from

1.4 Your contact phone number and best time to call

Your phone number

Best time to call

1.5 Your agent's name

1.6 Your agent's address

1.7 Your agent's 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, put 'X' in the box

UK employment income, pensions and state benefits

2.1 Total pay from all employments, before tax taken off (from P60/P45)

£ ____ . __

2.2 Tax taken off box 2.1 income

£ ____ . __

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

£ ____ . __

2.4 If you do not receive State Pension, put 'X' in the box ☐

2.5 Total of other taxable state benefits

£ ____ . __

2.6 Tax taken off any taxable Incapacity Benefit included in box 2.5

£ ____ . __

2.7 Total of other pensions and retirement annuities, before tax taken off

£ ____ . __

2.8 Tax taken off box 2.7

£ ____ . __

2.9 Flat rate expenses, professional subscriptions, etc

£ ____ . __

UK interest and dividends

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

3.1 Net interest paid by banks, building societies etc, purchased life annuities and PPI payments - after tax taken off

£ ____ . __

3.2 Tax taken off

£ ____ . __

3.3 Gross amount - the amount before tax taken off

£ ____ . __

3.4 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 UK company dividends (but do not add on the tax credit)

£ ____ . __

3.6 Dividends from UK authorised unit trusts, open-ended investment companies and investment trusts (but do not add on the tax credit)

£ ____ . __

3.7 Stock dividends - enter the appropriate amount in cash/ cash equivalent of the share capital - without any tax

£ ____ . __

Trust, settlement and estate income

4.1 Unique Taxpayer Reference (UTR) of the trust

____ ____ ____ ____ ____ ____ ____ ____ ____ ____

4.2 Net amount taxed at trust rate - after tax taken off

£ ____ . __

4.3 Tax paid on box 4.2 income

£ ____ . __

4.4 Net amount of non-savings income - after tax taken off

£ ____ . __

4.5 Tax paid or tax credit on box 4.4 income

£ ____ . __

4.6 Net amount of savings income - after tax taken off

£ ____ . __

4.7 Tax paid on box 4.6 income

£ ____ . __

4.8 Net amount of dividend income

£ ____ . __

4.9 Tax credit on box 4.8 income

£ ____ . __

4.10 Income payments from settlor-interested trusts

£ ____ . __

4.11 Net amount of dividend income - after tax taken off

£ ____ . __

4.12 Tax paid on box 4.11 income

£ ____ . __

UK land and property

5.1 Income

£ .

5.2 Expenses allowable for tax

£ .

5.3 Profit

£ .

5.4 Loss

£ .

5.5 Land and property losses brought forward from earlier years

£ .

Foreign income

Enter the sterling equivalent of your foreign income and tax paid. If there's more than one country of origin, give the additional details on a separate sheet. Enter foreign dividends of £2,000 or less.

If you're a non-resident landlord, then foreign interest and foreign pensions need to be reported through self-assessment.

6.1 Foreign dividends (net amount)

£ .

6.2 Foreign tax taken off box 6.1 income

£ .

6.3 Foreign dividends eligible for tax credit (net amount)

£ .

6.4 Foreign tax taken off box 6.3 income

£ .

6.5 Foreign property income - before expenses

£ .

6.6 Foreign property - expenses allowable for tax

£ .

6.7 Foreign tax taken off box 6.5 income

£ .

6.8 Foreign interest and other savings

£ .

6.9 Foreign tax taken off box 6.8 income

£ .

6.10 Foreign pensions and any other foreign income

£ .

6.11 Foreign tax taken off box 6.10 income

£ .

6.12 Country of origin

Any other income and benefits

7.1 Chargeable event gains

£ .

7.2 Number of years

7.3 Tax treated as paid on box 7.1 income

£ .

7.4 Other income and benefits (gross amount)

£ .

7.5 Tax taken off box 7.4

£ .

7.6 Description of box 7.4 income

Gift Aid

8.1 Gift Aid payments made in the year of claim

£ .

8.2 Gift Aid payments made in the year of claim but treated as if made in the preceding year

£ .

8.3 Total of any 'one-off' payments included in box 8.1

£ .

8.4 Gift Aid payments made after the end of the year of claim but to be treated as if made in that year

£ .

Blind 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

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.

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

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

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

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

10.5 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 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 www.gov.uk/government/publications/income-tax-notice-of-transfer-of-surplus-income-tax-allowances-575t and attach it to this claim form.

Repayment instructions

11.1 Where should we send the repayment to?

Your address

Your nominee's address
(go to question 11.2 to 11.3)

11.2 If you would like the payable order to go to your nominee, enter in full the name, address and postcode

11.3 If your nominee is your adviser, enter their reference

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

12.1 Sign and date this form and then write your full name (in capital letters) in the space provided

The information I've given on this form is correct and complete to the best of my knowledge.

Signature

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