

Trusts etc

Tax year 6 April 2022 to 5 April 2023 (2022-23)

Your name	Your Unique Taxpayer Reference (UTR)		
For help filling in this form, go to www.gov.uk/taxreturnforms and read the notes and helpsheets.			

Income from trusts and settlements

Discretionary income payment from a UK resident trust	
1 Net amount – after tax taken off £ • 0 0	2 Total payments from settlor-interested trusts £ 0 0
Non-discretionary income entitlement from If you've received income from residential property, conside	
3 Net amount of non-savings income – after tax taken off	5 Net amount of dividend income – after tax taken off £ • 0 0
4 Net amount of savings income – after tax taken off £ • 0 0	6 If you've included in your tax return income from trusts or settlements whose trustees are not resident in the UK for tax purposes, put 'X' in the box

Income chargeable on settlors

If you've received income from residential property, consider completing box 25.

 7 Net amount of non-savings income taxed at basic rate – after tax taken off £ 	11 Net amount of savings income taxed at trust rate - after tax taken off £
 8 Net amount of savings income taxed at basic rate – after tax taken off £ 	12 Net amount of dividend income taxed at dividend trust rate – after tax taken off £
9 Net amount of dividend income taxed at dividend rate – after tax taken off £ • 0 0	13 Non-savings income paid gross £ 0
10 Net amount of non-savings income taxed at trust rate – after tax taken off £ • 0 0	 14 Savings income paid gross £ 15 Additional tax paid by the trustees on certain
	UK life insurance policy gains £

Turn over for income from the estates of deceased persons

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	Income from United Kingdom (UK) estates		
	If you've received income from a UK estate only, enter the	net in	come after tax paid or tax credit in boxes 16 to 19.
	If you've received income from residential property, consider		-
16		18.1	Dividend income that has been taxed at 7.5%
	This includes rental income and profits from a trade.		 after tax taken off
			This includes dividends from UK and foreign companies.
			£ 00
	_		
17			
	This includes bank or building society interest.	19	
	£ 0 0		basic rate – after tax taken off
			This includes gains realised on certain
			life insurance policies.
18			£
	This includes dividends from UK and foreign companies.		
	Do not include dividend income that has been taxed at		
	7.5%, this goes in box 18.1.		Boxes 20 and 21 are not in use
	£ 0 0		
	Income from foreign estates		
	If you've received income from a foreign estate do not fill in	boxe	es 16 to 19. Instead, enter the income in box 22
	and any relief for UK tax already accounted for in box 23.		
22	Foreign estate income	23	Relief for UK tax already accounted for
	£ 0 0		£ 0 0
	Foreign tax paid on estate income		
	•		
	Fill in box 24 if any Foreign Tax Credit Relief is claimable b	ut na	s not been claimed on foreign income arising to
	a UK estate or a foreign estate.		
24	Foreign tax for which Foreign Tax Credit Relief		
	has not been claimed		

Residential property income

£

2	5 Amount of residential property income or restricted	25.1 Unused residential property finance costs
	finance costs from trusts and estates for calculating	brought forward
	relief for residential finance costs – use the working sheet in the notes	£
	£	

• 0 0

Any other information

26	Please give any other information in this space