



About this form

Please complete this form and send it to us at:

Employee Benefit Trust Team
HMRC Trusts & Estates
Meldrum House
15 Drumsheugh Gardens
EDINBURGH
EH3 7UB

Your rights and obligations

Your Charter explains what you can expect from us and what we expect from you. For more information go to hmrc.gov.uk/charter

Company details

1 Name of company

2 Full name of trust

3 Unique Taxpayer Reference (UTR) for the company

4 Date of company incorporation DD MM YYYY

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5 Date of contribution DD MM YYYY

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6 Amount of contribution

7 Main activities of the company at the date of contribution

8 Details of any excepted assets. Refer to Section 112 IHTA 1984 *Please state 'none' if applicable*

9 Name of each participator at the contribution date and the extent of their rights and interests in the company at the date of contribution

Name	Extent %
<input type="text"/>	<input type="text"/>

10 Did each of the participators own all of his/her shareholding(s) throughout the two years up to the contribution date?

Yes ☐

No ☐ Please include full details in the Additional information section overleaf

Contract for sale

11 Was the whole or any part of the business, or any of the company's assets subject to a binding contract for sale at the contribution date?

Yes ☐ Please include full details in the Additional information section below

No ☐ Go to Declaration

Additional information

Declaration

I declare that the information I have given in this form is true and complete.

Signature

Date DD MM YYYY