



Employer PAYE reference

National Insurance number

Issued by

Phone

Date

Your PAYE tax code

We are sorry to hear about your bereavement and to have to trouble you at this time. But as you are now receiving, or are about to receive, a bereavement benefit this could affect your PAYE tax code.

Your tax code may also need changing if:

- you have started to receive an occupational or personal pension
• you are nearing State Pension age and may soon be getting your State Pension
• you already receive a pension but you are nearing age 65 (and higher tax allowances may be due).

The information we ask for here will enable us to give you the correct tax allowances for the tax year - a tax year starts on 6 April one year and ends on 5 April the next.

We want you to pay the right amount of tax: failure to complete this form may mean you pay too much, or too little.

If you want a large print version of the form, or any help with completing it, please phone us on the number above.

Personal details

Your first name (s)

Text input field for first name

Your last name

Text input field for last name

Your contact daytime phone number

Text input field for phone number

Your date of birth DD MM YYYY

Date input field for date of birth

Please enter the date you were married

Date input field for date married

Please confirm the date of birth of your late spouse or civil partner

Date input field for spouse's birth date

Please confirm the date of death of your late spouse or civil partner

Date input field for spouse's death date

Your late spouse's or civil partner's full name

Text input field for spouse's full name

Their National Insurance number

Text input field for spouse's NI number

Withdrawing notice: Withdrawn, do not use

Your State Pension, Bereavement Allowance or Widowed Parent's Allowance

If you do not know the details of your State Pension or Bereavement Allowance(s) please hold on to the form until you do.

<p>Which benefit do you receive?</p> <p>State Pension <input type="checkbox"/></p> <p>Widowed Parent's Allowance <input type="checkbox"/></p> <p>Bereavement Allowance <input type="checkbox"/></p> <p>Start date of your State Pension, Widowed Parent's Allowance or Bereavement Allowance DD MM YYYY</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>Weekly amount of your State Pension, Widowed Parent's Allowance or Bereavement Allowance (exclude Pension Credit and Child Dependency Addition, Attendance Allowance and Disability Allowance)</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>If you received the State Pension before your spouse's/civil partner's date of death, what was the weekly amount?</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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Other pensions

If you have more than two pensions, include details of the others on page 4.

First pension	Second pension										
Name and address of pension provider	Name and address of pension provider										
<table border="1"> <tr><td>Name</td></tr> <tr><td>Address</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td>Postcode</td></tr> </table>	Name	Address			Postcode	<table border="1"> <tr><td>Name</td></tr> <tr><td>Address</td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td>Postcode</td></tr> </table>	Name	Address			Postcode
Name											
Address											
Postcode											
Name											
Address											
Postcode											
Type of pension	Type of pension										
<p>Personal pension <input type="checkbox"/></p> <p>Occupational pension <input type="checkbox"/></p> <p>Retirement annuity <input type="checkbox"/></p> <p>Other, for example State Pension <input type="checkbox"/></p>	<p>Personal pension <input type="checkbox"/></p> <p>Occupational pension <input type="checkbox"/></p> <p>Retirement annuity <input type="checkbox"/></p> <p>Other, for example State Pension <input type="checkbox"/></p>										
Pension number, if known	Pension number, if known										
<input type="text"/>	<input type="text"/>										
Pension provider's PAYE tax reference	Pension provider's PAYE tax reference										
<input type="text"/>	<input type="text"/>										
Date pension began	Date pension began										
<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"/>										
Amount of current monthly pension, before tax	Amount of current monthly pension, before tax										
£ <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"/>										

Jobseeker's Allowance, taxable Incapacity Benefit or Employment and Support Allowance

Your current weekly benefit £ <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"/>	Date benefit started 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"/>
Please tick if you receive: Jobseeker's Allowance <input type="checkbox"/> Taxable Incapacity Benefit <input type="checkbox"/> Employment and Support Allowance <input type="checkbox"/>	If you expect this benefit to end, enter the date it will stop being paid <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Other taxable income

To check you are paying the correct amount of tax, we need to know about any other taxable income.

If you are employed now or have been in the last 12 months Name and address of employer <table border="1"><tr><td>Name</td></tr><tr><td>Address</td></tr><tr><td> </td></tr><tr><td> </td></tr><tr><td>Postcode</td></tr></table> Your works or payroll number <input type="text"/> Date you started in this employment <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Monthly pay, before tax £ <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"/> Date you intend to stop working or the date you ceased working <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Employer's PAYE reference number, if known <input type="text"/>	Name	Address			Postcode	If you are self-employed What kind of self-employed work do you do? <input type="text"/> When did you start <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Your estimated profits for this tax year £ <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"/> Your 10 digit tax reference (UTR from page 1 of your Tax Return) <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"/> Date you intend to stop working, if applicable <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name						
Address						
Postcode						

Savings income

With joint accounts, enter only *your* share. Do not include any non-taxable exempt income such as interest from an ISA or the first £70 from a National Savings Ordinary Account.

Taxed bank and building society interest

Total estimated interest (after tax) for this tax year

£ .

Untaxed interest - from some National Savings & Investment products, such as pensioner, income and capital bonds

Total estimated interest for this tax year

£ .

Company dividends - including dividends from unit trusts

Estimated dividend income for this tax year, excluding tax credit

£ .

Purchased life annuities

Estimated taxable income for this tax year

£ .

Any other taxable income

For example, rents received from property letting, Carer's Allowance or foreign pensions. (Please provide details in the 'Other information' box below).

Estimated other taxable income for this tax year

£ .

Other information

For example, do you expect any changes in your income in the next 12 months? (Please continue on a separate piece of paper if necessary).

Charitable giving

If you are 65 or over or you pay tax at a higher rate, the charitable payments you make under the Gift Aid scheme can reduce your tax bill.

Gift Aid payments you expect to make this tax year

£ .

Your signature

Your signature

Date DD MM YYYY

Please send the completed form to us at the address shown at the top of page 1.