



How to make your interim claim

Please use this form to make an interim claim for tax relief on tax paid on Individual Savings Account (ISA) investments.

These notes will help you to complete this form. You can find more information about ISAs on our website.

Go to www.gov.uk/government/publications/guidance-notes-for-isa-managers

Please use capital letters and black ink when you fill in this form.

Make sure that your claim reaches us no later than the last working day of the calendar month.

Our payment should reach you on the 17th day of the following month (or the next working day).

Send the completed form to:

Charities, Savings and International 1
HM Revenue and Customs
BX9 1AU

If your annual claim, form ISA14, is outstanding for the previous tax year, you cannot make a claim for the tax month ending 5 October (or any subsequent month).

Period of your claim

You may claim for up to 6 tax months using this form. A tax month begins on the sixth of the month and ends on the fifth of the following month.

Tax voucher received late

If a tax voucher is received late, you should still make a claim for the period during which the payment date (of the dividend or the interest) fell.

You can include the amount within this interim claim as long as:

- the period of the claim does not exceed 6 months, and
- the payment date does not fall in an earlier tax year

The 6-month period starts from the sixth day of the tax month in which the payment date fell to the fifth of the last tax month included in this claim. If the period of the claim exceeds 6 months or falls in an earlier tax year, you'll need to make a supplementary claim.

Making a supplementary claim

If you make a supplementary claim you must make sure that it's included in your annual claim, on form ISA14. This means you must either:

- include it within the annual claim you make for the tax year in which the payment date fell
- make a supplementary annual claim for the tax year in which the payment date fell if the annual claim for that year has already been made

ISA manager's details	
<p>1 ISA manager's reference</p> <input type="text" value="Z"/>	<p>3 Name of ISA scheme if appropriate</p> <input type="text"/> <input type="text"/>
<p>2 Name of ISA manager</p> <input type="text"/> <input type="text"/>	

