

# **Trusts etc**

Tax year 6 April 2024 to 5 April 2025 (2024-25)

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	2 Total payments from settlor-interested trusts   £   • 0	
Non-discretionary income entitlement from If you've received income from residential property, consider		
3 Net amount of non-savings income – after tax taken off	5 Net amount of dividend income – after tax taken off   £ 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	12 Net amount of dividend income taxed at
basic rate – after tax taken off	dividend trust rate – after tax taken off
£	£
9 Net amount of dividend income taxed at	13 Non-savings income paid gross
dividend rate – after tax taken off	
£ 00	£ 00
	14 Savings income paid gross
10 Net amount of non-savings income taxed at	
trust rate – after tax taken off	
£	
	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 income after tax paid or tax credit in boxes 16 to 19.			
	If you've received income from residential property, conside	er con	npleting box 25.	
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	
	£ 0 0		This includes dividends from UK and foreign companies.	
			£ 0 0	
17	Savings income – after tax taken off			
	This includes bank or building society interest.	19	Non-savings income taxed at non-repayable	
	£ 0 0 · 0 0		basic rate – after tax taken off	
			This includes gains realised on certain	
40	Dividend income – after tax taken off		life insurance policies.	
18	This includes dividends from UK and foreign companies.		£ 0 0	
	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	
	£		Doxes 20 and 21 are not in use	
	Income from foreign estates			
	If you've received income from a foreign estate do not fill in	boxe	s 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	
	£ 00		£ 00	
	Foreign tax paid on estate income			
	Fill in box 24 if any Foreign Tax Credit Relief is claimable b	ut has	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

£

	nt of residential property income or restricted e costs from trusts and estates for calculating	25.1 Unused residential property finance costs brought forward
relief f in the r	for residential finance costs – use the working sheet notes	£
£		

• 0 0

### Any other information

26	26 Please give any other information in this space			