



Notice of transfer of surplus Income Tax allowances for the last tax year ended 5 April

Fill in this form if you had surplus tax allowance in the last tax year to 5 April, and want to transfer these to your spouse or civil partner, even if they've already had some of your allowance in their PAYE code. This will help us to check that the right amount is, or has been, given.

Important: If your spouse or civil partner is working or receiving a pension, and either of you were 65 or over on 5 April 2000, we'll continue to give your spouse or civil partner transferred allowances in their PAYE code for the next tax year starting 6 April.

If you do not want your spouse or civil partner to continue having the allowances because, for example, your circumstances have changed, put an 'X' in this box

7

Your full name

Your address

Postcode

Your daytime telephone number

Best time to call

Your email address (if you have one)

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Your spouse's or civil partner's full name

Your spouse's or civil partner's address (if different to yours)

Postcode

Your date of marriage or civil partnership DD MM YYYY

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Your spouse's or civil partner's HM Revenue and Customs reference - this can be found on any letter or form they have received from their HMRC office

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Your spouse's or civil partner's National Insurance number
- this may be shown on a letter from the Department for
Work and Pensions

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Statement of income and deductions
for the year ended 5 April

Your wages or salary from employment

£	
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Your casual earnings

£	
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Name and address of your employer - if more than one, enter the last

Postcode

Income from self-employment

£	
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State pensions, benefits and allowances - for example, State Pension, Jobseeker's Allowance, Taxable Incapacity Benefit, Employment and Support Allowance

£	
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Type of pension, benefit or allowance

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Other pensions

£

Name and address of payer

Postcode

Interest from National Savings and Investments (NS&I) products (without tax taken off)

£

Other interest (without tax taken off)

£

Other interest (where tax has been taken off)

£

Tax taken off or tax credit

£ .

Amount received after tax

£ .

Dividends from shares in UK companies and income from unit trusts

£

Tax taken off or tax credit

£ .

Amount received after tax

£ .

Income from furnished rooms or letting property

£

Any other taxable income

£

Description

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Add the deductions claimed for year to 5 April (other than personal allowances)

£ £

Descriptions

Claim for allowances

Tick the box(es) for the allowances you wish to claim for the year ended 5 April

- ☐ Married Couple's Allowance - you can only claim if you're living with your spouse or civil partner and either of you were born before 6 April 1935
- ☐ Blind Person's Allowance - for details about this allowance and the evidence required, please read page 1 of the notes

Your date of birth DD MM YYYY

Your spouse's or civil partner's date of birth DD MM YYYY

Declaration

I have claimed allowances, and I agree to transfer to my spouse/civil partner any surplus of the allowance(s) I have ticked below.

- ☐ Surplus Married Couple's Allowance
- ☐ Surplus Blind Person's Allowance (if due)

The information I have given on this form is correct and complete to the best of my knowledge and belief.

Signature

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Date DD MM YYYY

Please send your completed form with evidence (see page 1 of the notes) to:

HM Revenue and Customs
Pay As You Earn and Self Assessment
BX9 1AS
United Kingdom