

1.2 National Insurance number

put 'X' in the box

1.3 Name and address - if it is different from above. Please write the correct details underneath the wrong ones, and

## Claim for repayment of tax deducted from savings and investments

	If not already shown, please enter your name and address in this box to make sur that we can deal with your claim	Your reference Tax reference e			
Year to:	5 April				
How to	fill in this form				
Please fill in this form with details of your income for the above tax year. The enclosed Notes will help you (but there is not a note for every box on the form). If you need more help with anything on this form, please phone us on the number shown above.		<ul> <li>This form is designed to be read by machine - please follow the completion instructions so that it may be read correctly:</li> <li>write inside the boxes, using black ink and capital letters</li> <li>if you make a mistake, cross it out and write the correct information below it</li> </ul>			
If you are no contact us.	ot a UK resident, do not use this form - please	<ul> <li>leave blank any boxes or sections that do not apply to you – please do not strike through them.</li> </ul>			
	ot send us any personal records, or tax or vouchers with your form. We will contact eed these.	Cross out any mistakes and write to correct information below	the Use black ink and capital letters		
	four weeks before contacting us about your We will pay you as quickly as possible.	2.8 Tax taken off box 2.74 9	If you would like the payable order to go building society or any other nominee, address and postcode		
Personal	details				
1.1 Date o	f birth DD MM YYYY	1.4 Your contact phone numb  Your phone number	er(s)		

Your agent's phone number

put 'X' in the box

1.5 If this is an interim claim and you expect to receive more

income before the end (5 April) of the above tax year,

UK employment income, pensions and state t	penerits
2.1 Total pay from all employments, before tax taken off (from P60/P45)  £  2.2 Tax taken off box 2.1 income  £  2.3 State Pension - enter the amount for the year (not the weekly, or four weekly, amount). Do not include Attendance Allowance, Disability Living Allowance or Pension Credits  £  1.1 Total pay from all employments, before tax taken off (from P60/P45)  £  2.2 Tax taken off box 2.1 income  £  2.3 State Pension - enter the amount for the year (not the weekly, or four weekly, amount). Do not include Attendance Allowance, Disability Living Allowance or Pension Credits  £  2.4 If you do not receive State Pension, put 'X' in the box	2.5 Total of other taxable state benefits  £  2.6 Tax taken off any taxable Incapacity Benefit included in box 2.5  £  2.7 Total of other pensions and retirement annuities, before tax taken off  £  2.8 Tax taken off box 2.7
	2.9 Additional information - see page 3 of the notes
UK interest and dividends	
With joint accounts, only enter <b>your share</b> of the interest respectively.  3.1 Net interest paid by banks, building societies etc. and purchased life annuities – after tax taken off  £  3.2 Tax taken off  £  3.3 Gross amount – the amount before tax taken off  £  3.4 If you get interest that has not been taxed at all, put the total in this box, not in box 3.3  £	3.5 UK company dividends (but do not add on the tax credit)  £  3.6 Dividends from UK authorised unit trusts, open-ended investment companies and investment trusts (but do not add on the tax credit)  £  3.7 Stock dividends - enter the appropriate amount in cash/cash equivalent of the share capital - without any tax
Trust, settlement and estate income  4.1 Please give the Unique Taxpayer Reference (UTR) of the trust  4.2 Net amount taxed at trust rate - after tax taken off  £  4.3 Tax paid or tax credit on box 4.2 income  £  4.4 Net amount of non-savings income - after tax taken off  £  4.5 Tax paid or tax credit on box 4.4 income	4.6 Net amount of savings income - after tax taken off  £  4.7 Tax paid or tax credit on box 4.6 income  £  4.8 Net amount of dividend income  £  4.9 Tax credit on box 4.8 income  £  4.10 Income payments from settlor-interested trusts  £  4.11 Income taxed at 22% - after tax taken off

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UK I	UK land and property				
5.1	Income •	5.4	Loss •		
5.2	Expenses allowable for tax  •	5.5	Land and property losses brought forward from earlier years		
5.3	Profit • • • • • • • • • • • • • • • • • • •				
Fore	eign income				
	Please enter the sterling equivalent of your foreign income please give the additional details on a separate sheet.	and ta	x paid. If there is more than one country of origin		
6.1	Foreign dividends (net amount)	6.7	Foreign tax taken off box 6.5 income		
	£ ·		£ · ·		
6.2	Foreign tax taken off box 6.1 income	6.8	Foreign interest and other savings		
	£ ·		£ ·		
6.3	Foreign dividends eligible for tax credit (net amount)	6.9	Foreign tax taken off box 6.8 income		
	£ ·		£		
6.4	Foreign tax taken off box 6.3 income	6.10	Foreign pensions and any other foreign income		
	£		£		
6.5	Foreign property income - before expenses	6.11	Foreign tax taken off box 6.10 income		
	£ ·		£		
6.6	Foreign property - expenses allowable for tax	6.12	Country of origin		
	£				
Any	other income and benefits				
7.1	Chargeable event gains	7.4	Other income and benefits (gross amount)		
	£ · ·		£ ·		
7.2	Number of years	7.5	Tax taken off box 7.4		
			£		
7.3	Tax treated as paid on box 7.1 income	7.6	Description of box 7.4 income, etc.		
	£				
Gift	Aid				
8.1	Gift Aid payments made in the year of claim	8.3	Total of any 'one-off' payments included in box 8.1		
	£ ·		£		
8.2	Gift Aid payments made in the year of claim but treated as if made in the preceding year	8.4	Gift Aid payments made after the end of the year of claim but to be treated as if made in that year		
			f		

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Blin	d Person's Allowance				
9.1	If you are registered blind with a local authority, or other register, put 'X' in the box		Enter the name of the local authority, or other register (or 'Scotland' or 'Northern Ireland', as appropriate)		
	Please also consider box 10.6 below				
Mar	ried Couple's Allowance				
	This allowance is only due if you, or your spouse or civil pa	artner, w	vere born <b>before 6 April 1935</b> . Read page 11 of the Notes.		
10.1	To claim the full allowance, enter your spouse's or civil partner's full name		Your spouse's or civil partner's date of birth if older than you and you filled in boxes 10.1, 10.2 or 10.3 DD MM YYYY		
10.2	If, as a couple, you have already asked us to give all of the minimum amount to your spouse or civil partner, put 'X' in the box  If you've already agreed that half of the minimum amount is to go to your spouse or civil partner, put 'X' in the box	10.5	Enter the date of the marriage or civil partnership DD MM YYYY  Any unused Married Couple's, or Blind Person's Allowance can be transferred from one spouse or civil partner to the other - if you want us to send you a form to do this, put 'X' in the box or you can download it from		
	is to go to your spouse or civit partitle, put X in the box		hmrc.gov.uk/forms/575-t-man.pdf and attach it to this claim form.		
Rep	ayment instructions				
11.1	If you would like the payable order to go to your bank, building society or any other nominee, please enter in	socie	payable order is to be sent to your bank or building ty, fill in boxes 11.1, 11.3, 11.4, 11.5 and 11.6, if applicable		
	full the name, address and postcode	11.3	Branch sort code		
		11.4	Account number		
		11.5	Name of account holder		
	If your nominee is your adviser, enter their reference				
11.2	ii your nominee is your adviser, enter their reference	11.6	Bank or building society roll or reference number, if you have one		
Dec	laration - Please make sure that you have r	ead th	e R40 Notes at section 12.2 before signing		
12.1	Please sign and date this form and then write your full name  The information I have given on this form is correct and correct.				
	Signature  Name and title in capital letters		Date Date		
12.2	If you have signed on behalf of someone else, enter the capacity, for example, parent, executor, receiver, attorney	12.3	Tick this box if you do not need a claim form in future		

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