

Claim for Repayment

If the address in this box is wrong, please change it. If no address is shown please enter your correct details

Year to:

Please use this form to give details of total taxable income for the above tax year. We will then be able to see if you, or the person you are claiming for, is due a repayment. Do not use estimates of income. Please refer to documents about your income; for example pension books, dividend vouchers, certificates of tax deducted, forms P45 and P60. **You do not need to send any documents with this form.** If you need any help or advice please contact the HM Revenue & Customs (HMRC) office shown above or your local HMRC Enquiry Centre (see under HM Revenue & Customs or Inland Revenue in the phone book). When you have made the claim please allow four weeks before contacting the HMRC office about the repayment. **This form is also available in large print. Remember to sign the declaration on page 4.**

If this is an interim claim and you expect to receive further income before the end of the tax year (see page 2 of the enclosed R40(2006) Notes), please put a '✓' in this box.

If there is not enough space in any section please give extra details on a separate sheet

1a. Dividends from UK companies, UK Authorised Unit Trusts (AUTs) and UK Open-ended Investment Companies (OEICs)

Stock Dividends should be entered in 1b, and Foreign Dividends in 1c.

For joint holdings of all investments enter only your share or the share of the person you are claiming for.

Name of UK company, UK AUT or UK OEIC

	Dividend		Tax credit*	
	£	p	£	p
Total				

* You cannot claim payment of tax credits on UK dividends - see Note 1a.

1b. Stock Dividends from UK companies and Foreign Income Dividends

Enter the amount of dividend as notified by the company. *For joint holdings of all investments enter only your share or the share of the person you are claiming for.*

Name of UK company

	Dividend		Tax treated as paid*	
	£	p	£	p
Total				

* This is not repayable tax - see Note 1b.

1c. Foreign dividends

Country	Name of company	Gross dividend		UK tax		Foreign tax*	
		£	p	£	p	£	p
	Total						

* This is not repayable tax - see Note 1c.

2a. UK savings income with tax paid

For accounts held jointly enter only your share or the share of the person you are claiming for.

Name of payer and account number(s)	Income before tax		Tax deducted		Income after tax	
	£	p	£	p	£	p
Total						

See Note 2a for other types of taxed income to enter in this section.

2b. UK savings income without tax paid

For accounts held jointly enter only your share or the share of the person you are claiming for. Please remember to include interest from all accounts registered for gross interest

Name of payer and account number(s)	NSB ordinary account?	* R85 completed?	Amount received	
			£	p
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Total				

* See Note 2b for conditions for ticking this box.

Note 2b lists other possible types of untaxed interest to enter here.

3. State Retirement Pension

State retirement pension is taxable. Enter the total for the year not the weekly or monthly amount. Do not include attendance allowance or disability living allowance. If you are a woman aged 60 or over or a man aged 65 or over and you do not receive state retirement pension tick this box.

£	p

4. Earnings, pensions (other than State Pension) and other income on which tax paid

Name of payer	P45/P60	Total before tax		Tax deducted	
		£	p	£	p
	<input checked="" type="checkbox"/>				
Total					

See Note 4 for other types of taxed income to enter in this section.

5. Social Security Benefits, Income from Property and all other income on which you have NOT paid tax

See Note 5 for types of income to enter in this section. Enter the net amount of income from property after deductions and give details of expenses in the Additional information box on page 4.

	Amount received	
	£	p
Total		

If you receive Incapacity Benefit please state the date it began. / /

6. Income from trusts or settlements or estates of deceased persons

If your statement of income from a trust or estate shows that the tax is 'non-repayable', mark your entry 'non-repayable'.

Nature of payment and full name of trust or estate	Income before tax		Tax treated as paid		Income after tax	
	£	p	£	p	£	p
Total						

See Note 6a for income from trusts or settlements and Note 6b for estate income.

7. Chargeable events

Gains on UK policies on which tax is treated as paid

Name of payer

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Number of years

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Tax treated as paid

£	p
Total	

Amount of gain

£	p
Total	

8. Deductions including Gift Aid payments

Nature of payment

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Amount paid

£	p
Total	

See Note 8 for details of these deductions

9. Married Couple's Allowance (MCA)

You can only claim MCA if either you, your spouse or civil partner were born before 6 April 1935.

If you are eligible to claim MCA make sure you enter your date of birth in Section 14.

For marriages before 5 December 2005 MCA is given to the husband in the first place, and for marriages and civil partnerships formed on or after 5 December 2005, MCA is given to the spouse or civil partner with the higher income. We can change this arrangement, but strict time limits apply - see Note 9.

Tick this box to claim MCA.

If you married or formed a civil partnership in the year of claim enter your date of marriage or civil partnership here. / /

If your spouse or civil partner was born before 6 April 1935 enter their date of birth here. / /

If you cannot use all of your MCA you can transfer any surplus to your spouse or civil partner. Tick this box and we will send you form 575 to complete.

Enter your spouse's or civil partner's name, National Insurance number, HM Revenue & Customs office and tax reference.

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10. Children's Tax Credit (CTC)

CTC is a tax relief available for 2001-02 and 2002-03. It is for people who have a child under 16 years of age living with them for at least part of the year. See Note 10 if you think you are eligible to claim the relief. If you think you are, tick this box and we will send you a claim form 11CTC.

11 Blind Person's Allowance (BPA)

See Note 11 for full details

Tick this box to claim BPA.

Give the date your blindness was registered / /

Give the name of the local authority or equivalent where your blindness is registered.

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Any unused BPA can be transferred from one spouse or (from 5 December 2005 for tax year 2005-06) civil partner to the other. Tick here if you want a form 575 to do this.

12. Capital Gains

Please see the list opposite. If your total gains exceed the exempt amount in any year, tick this box and we will send you a form R40(CG) to complete.

- £7,200 in 2000-01
- £7,500 in 2001-02
- £7,700 in 2002-03
- £7,900 in 2003-04

- £8,200 in 2004-05
- £8,500 in 2005-06
- £8,800 in 2006-07

See Note 12 for more details

13. Additional information - Note 13 tells you what to put in here

14. Claim and repayment details - you must fully complete this section even if you are claiming for someone else

Enter your date of birth if you are claiming for yourself or the date of birth of the person on whose behalf you are claiming. / /

Enter your National Insurance number (NINO) if you are claiming for yourself or the NINO of the person on whose behalf you are claiming. | | | | | | | |

If you are claiming for someone else, enter here your relationship to them. We may later call for evidence of your authority to claim, such as a birth certificate or court order.

Tick one of these boxes to let me know where to send the repayment

- Yourself. Now complete **section 16**
- Your agent. Now complete **sections 15 and 16**
- A bank, building society or other nominee. Now complete **sections 15 and 16**

15. Payment to a nominee

I authorise the person or organisation named below to receive the amount due on my behalf.

Name of person/agent/bank or building society

Address of person/agent/bank or building society

Bank or building society account number | | | | | | | | Sort code - -

Account holder's name *This must be the same as the person entitled to the repayment*

If your account requires a building society number to be quoted enter it here.

Agent's reference for you (if your agent is the nominee)

Signature

A photocopy of your signature will not be accepted

Now also sign the declaration at section 16.

16. Declaration

To the best of my knowledge and belief, the details given on this form are correct and complete and I claim the repayment due.

Signature

Date

It will help to process your claim more quickly if you can give your own, or your agent's day-time telephone number

Own Agent

What happens next?

If possible, we process your claim using the figures you have given. You (or your nominated person or bank or building society) will receive a cheque and explanation of how the amount has been calculated. We may make an enquiry into your claim before or after the repayment cheque has been issued. There is a time limit within which an enquiry may be opened. Details are given on page 1 of the enclosed R40(2006) Notes.