



UTR
Tax reference
Employer reference

Issue address

Date

HM Revenue & Customs office address

Telephone

For
Reference

Please read this page before you start to fill in your Tax Return.

The green arrows and instructions will guide you through your Tax Return.

This Notice requires you, by law, to send us a Tax Return containing details of your income and capital gains, together with any documents asked for, for the year 6 April 2006 to 5 April 2007.

Time limits

You must get your Tax Return to us by the later of:

- **30 September 2007** and two months after the date this Notice was given, if you want us to calculate your tax, **OR**
- **31 January 2008** and three months after the date this Notice was given if you calculate your tax yourself. If you miss this date you risk a penalty.

And you must pay any tax due by:

- **31 January 2008** to avoid interest and surcharges.

To do this you can:

- file online – it is safe, quick and your tax calculation is done for you, and an instant online acknowledgement will tell you that your Tax Return has been safely received. Register for the online service at **www.hmrc.gov.uk** and select Self Assessment under 'do it online'
- fill in this form and any supplementary Pages you may need
- use another HM Revenue & Customs approved paper Tax Return.

If you need help we are here – online and on the phone (your own office or the Helpline when the office is closed).

If you make a false return you risk being charged penalties and interest.



INCOME AND CAPITAL GAINS *for the year ended 5 April 2007*

Step 1

Answer the Questions below to check if you need supplementary Pages to give details of particular income or capital gains. Pages 6 and 7 of your Tax Return Guide will help you decide. (Ask the Orderline for a copy of the Guide if we have not sent you one with your Tax Return.) If you answer 'Yes' ring the Orderline on **0845 9000 404 (textphone available)**, or fax **0845 9000 604**, for the appropriate supplementary Pages and Notes.

Or you can go to www.hmrc.gov.uk and print copies from our website.

If you live or work abroad you can ring the Orderline using the International Access code followed by **(+44) 161 930 8331**, or fax **(+44) 161 930 8444**.

The Orderline is closed Christmas Day, Boxing Day and New Year's Day.

If you need supplementary Pages, tick the boxes below when you have got them.

Q1

Were you an employee, or office holder, or director, or agency worker or did you receive payments or benefits from a former employer (excluding a pension) in the year ended 5 April 2007?

If you were a non-resident director of a UK company but received no remuneration, see the Notes to the Employment Pages, page EN2.

YES

EMPLOYMENT

Q2

Did you have any taxable income from securities options, share options, shares or share related benefits in the year?

(This does not include:

- dividends, or

- dividend shares ceasing to be subject to a HM Revenue & Customs approved share incentive plan within three years of acquisition they go in Question 10.)

YES

SHARE SCHEMES

Q3

Were you self-employed (but not in partnership)?

(You should also tick 'Yes' if you were a Name at Lloyd's.)

YES

SELF-EMPLOYMENT

Q4

Were you in partnership?

YES

PARTNERSHIP

Q5

Did you receive any rent or other income from land and property in the UK?

YES

LAND & PROPERTY

Q6

Did you have any taxable income or payments from overseas pensions or benefits, or from foreign companies or savings institutions, offshore funds or trusts abroad, or from land and property abroad or gains on foreign insurance policies?

YES

Have you, or could you have, received or enjoyed directly or indirectly, or benefited in any way from, income or payments of a foreign entity as a result of a transfer of assets made in this or earlier years?

YES

Do you want to claim foreign tax credit relief for foreign tax paid on foreign income, payments or gains?

YES

FOREIGN

Q7

Did you receive, or are you deemed to have received, income from a trust, settlement or the residue of a deceased person's estate?

YES

TRUSTS ETC.

Q8

Capital gains - [read the guidance on page 7 of the Tax Return Guide.](#)

• If you have disposed of your only or main residence do you need the Capital Gains Pages?

YES

• Did you dispose of other chargeable assets worth more than £35,200 in total?

YES

• Answer 'Yes' if:

- allowable losses are deducted from your chargeable gains, which total more than £8,800 before deduction and before taper relief, or

- no allowable losses are deducted from your chargeable gains and after taper relief your taxable gains total more than £8,800, or

- you want to make a claim or election for the year.

YES

CAPITAL GAINS

Q9

Do you consider that you were, for all or part of the year, (a) not resident in the UK, and/or (b) not ordinarily resident in the UK, and/or (c) not domiciled in the UK and this was relevant to your Income Tax or Capital Gains Tax liabilities, or (d) dual resident in the UK and another country?

YES

NON-RESIDENCE ETC.

Q25

Pensions - tax charges and taxable lump sums - [first read the guidance on page 7 of the Tax Return Guide and if applicable answer 'Yes'.](#)

YES

PENSIONS

Step 2

Fill in any supplementary Pages **BEFORE** going to Step 3.

Please use **blue or black ink to fill in your Tax Return and please do not include pence.** Round down your income and gains. Round up your tax credits and tax deductions. Round to the nearest pound.

When you have filled in all the supplementary Pages you need, tick this box.

Step 3

Fill in Questions 10 to 24. If you answer 'Yes', fill in the relevant boxes. If not applicable, go to the next question.

INCOME for the year ended 5 April 2007

Q10 Did you receive any income from UK savings and investments?

YES

If yes, tick this box and then fill in boxes 10.1 to 10.26 as appropriate. Include only your share of any joint savings and investments. If not applicable, go to Question 11.

Interest and alternative finance receipts

- Interest and alternative finance receipts from UK banks or building societies including UK Internet accounts. *If you have more than one bank or building society account enter totals in the boxes.*

- enter any bank or building society interest and alternative finance receipts that **have not had tax taken off**. (Interest and alternative finance receipts are usually taxed before you receive them so make sure you should be filling in box 10.1, rather than boxes 10.2 to 10.4.) Enter other types of interest and alternative finance receipts in boxes 10.5 to 10.14, as appropriate.

Taxable amount
10.1 £

- enter details of **taxed** bank or building society interest and **taxed** alternative finance receipts. *The Working Sheet on page 11 of your Tax Return Guide will help you fill in boxes 10.2 to 10.4.*

Amount after tax taken off	Tax taken off	Gross amount before tax
10.2 £	10.3 £	10.4 £

- Interest distributions from UK authorised unit trusts and open-ended investment companies (dividend distributions go below)

Amount after tax taken off	Tax taken off	Gross amount before tax
10.5 £	10.6 £	10.7 £

- National Savings & Investments (other than First Option Bonds and Fixed Rate Savings Bonds and the first £70 of interest from an Ordinary Account)

Taxable amount
10.8 £

- National Savings & Investments First Option Bonds and Fixed Rate Savings Bonds

Amount after tax taken off	Tax taken off	Gross amount before tax
10.9 £	10.10 £	10.11 £

- Other income from UK savings and investments (except dividends)

Amount after tax taken off	Tax taken off	Gross amount before tax
10.12 £	10.13 £	10.14 £

Dividends

- Dividends and other qualifying distributions from UK companies (enter distributions from the tax exempt profits of a Real Estate Investment Trust at Q13)

Dividend/distribution	Tax credit	Dividend/distribution plus credit
10.15 £	10.16 £	10.17 £

- Dividend distributions from UK authorised unit trusts and open-ended investment companies

Dividend/distribution	Tax credit	Dividend/distribution plus credit
10.18 £	10.19 £	10.20 £

- Stock dividends from UK companies

Dividend	Notional tax	Dividend plus notional tax
10.21 £	10.22 £	10.23 £

- Non-qualifying distributions and loans written off

Distribution/loan	Notional tax	Taxable amount
10.24 £	10.25 £	10.26 £

INCOME AND RELIEFS *for the year ended 5 April 2007*

Q13 Did you receive any other taxable income or benefit which you have not already entered elsewhere in your Tax Return? **YES**

Fill in any supplementary Pages before answering Question 13. (Supplementary Pages follow page 10, or are available from the Orderline, or www.hmrc.gov.uk)

If yes, tick this box and then fill in boxes 13.1 to 13.6 as appropriate. If not applicable, go to Question 14.

- Other taxable income (including dividends from the tax-exempt profits of a UK Real Estate Investment Trust that are normally paid under deduction of tax and any benefit arising from a pre-owned asset). *Read the notes on pages 18 and 21 of the Tax Return Guide. Also provide details in box 23.9.*

Amount after tax taken off	Tax taken off	Amount before tax
13.1 £	13.2 £	13.3 £

- Tick box 13.1A if you have claimed enhanced capital allowances for designated environmentally beneficial plant and machinery to arrive at box 13.1

13.1A <input type="checkbox"/>	Losses brought forward	Earlier years' losses used in 2006-07
	13.4 £	13.5 £
	2006-07 losses carried forward	
	13.6 £	

Q14 Do you want to claim relief for your pension contributions? **YES**

If your pension contributions are taken off your pay before it is taxed, no more tax relief is due – leave Question 14 blank. If you make any other type of pension contribution read page 21 of the Tax Return Guide and then complete Question 14.

If yes, tick this box and then fill in boxes 14.1 to 14.4 as appropriate. If not applicable, go to Question 15.

- Contributions you paid with basic rate tax deducted (called relief at source) – contributions paid to a personal pension or stakeholder pension scheme, or group personal pension; contributions paid to a Free-standing AVC Scheme; contributions paid to other pension schemes after deducting basic rate tax.**

Enter the full amount of the contribution and add back the basic rate tax deducted. *Read the notes on page 21 of your Tax Return Guide.* 14.1 £

- Contributions you paid in full – Enter the amount of contributions you paid. Read the notes on page 21 of the Tax Return Guide.**

Contributions under a retirement annuity contract paid in full without deducting basic rate tax 14.2 £

Contributions paid to your employer's occupational pension scheme which were not deducted from your pay before tax 14.3 £

Contributions paid to a non-UK registered overseas pension scheme which are eligible for tax relief, and were not deducted from your pay before tax 14.4 £

Q15 Do you want to claim any of the following reliefs? **YES**

If you have made any annual payments, after basic rate tax, answer 'Yes' to Question 15 and fill in box 15.9. If you have made any gifts to charity go to Question 15A.

If yes, tick this box and then fill in boxes 15.1 to 15.12, as appropriate. If not applicable, go to Question 15A.

Interest and alternative finance payments eligible for relief on qualifying loans and arrangements 15.1 £

Maintenance or alimony payments you have made under a court order, Child Support Agency assessment or other legally binding order or agreement 15.2 £

To claim this relief, either you, your former spouse or former civil partner must have been 65 or over on 5 April 2000. So, if **your** date of birth, which is to be entered in box 22.6, is after 5 April 1935, enter your former spouse's or former civil partner's date of birth in box 15.2A - *see page 23 of your Tax Return Guide.*

Former spouse's/civil partner's date of birth
15.2A / /

Subscriptions for Venture Capital Trust shares (up to £200,000) 15.3 £

Subscriptions under the Enterprise Investment Scheme (up to £400,000) - *also provide details in the 'Additional information' box, box 23.9, on page 10 - see page 23 of your Tax Return Guide.* 15.4 £

RELIEFS for the year ended 5 April 2007, continued

• Community Investment Tax relief - invested amount relating to previous tax year(s) and on which relief is due	15.5 £	Total amount on which relief is claimed box 15.5 + box 15.6
• Community Investment Tax relief - invested amount for 2006-07	15.6 £	15.7 £
• Post-cessation expenses, pre-incorporation losses brought forward and losses on deeply discounted securities, etc. - <i>see page 23 of your Tax Return Guide.</i>		Amount of payment/loss 15.8 £
• Trade annuities and patent royalties		Payments made 15.9 £
• Payments to a trade union or friendly society for death benefits		Half amount of payment 15.10 £
• Payments to your employer's compulsory widow's, widower's, surviving civil partner's or orphan's benefit scheme - <i>available in some circumstances - first read the notes on page 24 of your Tax Return Guide.</i>		Relief claimed 15.11 £
• Relief claimed on a qualifying distribution on the redemption of bonus shares or securities		Relief claimed 15.12 £

Q15A Have you made any gifts to charity?

YES

If yes, tick this box and then read page 25 of your Tax Return Guide. Fill in boxes 15A.1 to 15A.7 as appropriate.
If not applicable, go to Question 16.

• Gift Aid payments, including covenanted payments to charities, made between 6 April 2006 and 5 April 2007	15A.1 £
• The total of any 'one-off' payments included in box 15A.1	15A.2 £
• Gift Aid payments made after 5 April 2006 but treated as if made in the tax year 2005-06	15A.3 £
• Gift Aid payments made after 5 April 2007 but to be treated as if made in the tax year 2006-07	15A.4 £
• Total relief claimed in 2006-07	15A.5 £
• Gifts of qualifying investments to charities - shares and securities	15A.6 £
• Gifts of qualifying investments to charities - real property	15A.7 £

Q16 Do you want to claim blind person's allowance, or married couple's allowance?

YES

If you are resident in the UK you get your personal allowance of £5,035 automatically.

If you were born before 6 April 1942, enter your date of birth in box 22.6 - you may get a higher age-related personal allowance.

If yes, tick this box and then read pages 26 to 28 of your Tax Return Guide. Fill in boxes 16.1 to 16.17 as appropriate.
If not applicable, go to Question 17.

■ Blind person's allowance	If first year of claim, date of registration 16.1 / /	Local authority (or other register) 16.2
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■ Married couple's allowance

This allowance can only be claimed if either you or your spouse or civil partner were born before 6 April 1935, and:

- you are a man or woman who married before 5 December 2005, or
- you are a man, woman or civil partner who married or formed a civil partnership on or after 5 December 2005.

The allowance is made up of two amounts - a minimum amount (worth up to £235) and an age-related amount, dependent on the income of the husband (for marriages before 5 December 2005) or the person with the higher income (for marriages and civil partnerships formed on or after 5 December 2005). *Special rules apply if you are a married woman or a civil partner who does not have the higher income. Further guidance is given, beginning on page 27 of the Tax Return Guide.*

If both you and your spouse or civil partner were born after 5 April 1935 you cannot claim. Do not complete boxes 16.3 to 16.13.

If you can claim, fill in boxes 16.3 and 16.4.

• Enter your date of birth (if born before 6 April 1935)	16.3 / /
• Enter your spouse or civil partner's date of birth (only if born before 6 April 1935 and if older than you)	16.4 / /

ALLOWANCES AND OTHER INFORMATION *for the year ended 5 April 2007*

Then, if you are a married man, who married before 5 December 2005, or you married or formed a civil partnership on or after 5 December 2005 and you have the higher income, fill in boxes 16.5 to 16.9.

If you are a married woman, who married before 5 December 2005, or you married or formed a civil partnership on or after 5 December 2005 but you do not have the higher income, fill in boxes 16.10 to 16.13 to claim half, or all, of the minimum amount of the married couple's allowance.

● Spouse or civil partner's full name ● Date of marriage or formation of civil partnership (if after 5 April 2006) / /

● Tick box 16.7 or box 16.8 where half, or all, of the minimum amount of the allowance has been allocated to your wife, husband or civil partner Half All 16.7 16.8

● Enter in box 16.9 the date of birth of any previous wife, husband or former civil partner, with whom you lived at any time during 2006–07. Read 'Special rules if you are married or formed a civil partnership in the year ended 5 April 2007' on page 28 of your Tax Return Guide before completing box 16.9. / /

● Tick box 16.10 or 16.11 where half, or all, of the minimum amount of the allowance has been allocated to you Half All 16.10 16.11

● Spouse or civil partner's full name ● Date of marriage or formation of civil partnership (if after 5 April 2006) / /

■ **Transfer of surplus allowances** - read page 28 of your Tax Return Guide before you fill in boxes 16.14 to 16.17.

● Tick box 16.14 if you want your spouse or civil partner to have your unused allowances 16.14

● Tick box 16.15 if you want to have your spouse's or civil partner's unused allowances 16.15

Please give details in the 'Additional information' box, box 23.9, on page 10

If you want to calculate your tax, enter the amount of the surplus allowances you can have

● Blind person's surplus allowance £

● Married couple's surplus allowance £

Q17 Do you have an Income Contingent Student Loan for which you have received notification that repayment commenced before 6 April 2007? YES If yes, tick this box. If not applicable, go to Question 18. You must read the note on page 28 of your Tax Return Guide before ticking the 'Yes' box.

If yes, and you are calculating your tax enter, in Question 18, box 18.2A, the amount you work out is repayable in 2006–07.

Q18 Do you want to calculate your tax and, if appropriate, Class 4 National Insurance contributions and Student Loan Repayment? YES Use your Tax Calculation Guide then fill in boxes 18.1 to 18.8 as appropriate.

● Underpaid tax for earlier years included in your tax code for 2006-07 £

● Underpaid tax for 2006–07 included in your tax code for 2007–08 £

● Student Loan Repayment due £

● Class 4 NICs due £

● Pension charges due - enter the amount from box 32 of the Pensions supplementary Page £

● Total tax, Class 4 NICs and Student Loan Repayment due for 2006–07 before you made any payments on account (put the amount in brackets if an overpayment.) £

● Tax due calculated by reference to earlier years - see the notes on page 10 of your Tax Calculation Guide (SA151W). £

● Reduction in tax due calculated by reference to earlier years - see the notes on page 10 of your Tax Calculation Guide (SA151W). £

● Tick box 18.6 if you are claiming to reduce your 2007–08 payments on account. Make sure you enter the reduced amount of your first payment in box 18.7. Then, in the 'Additional information' box, box 23.9 on page 10, say why you are making a claim 18.6

● Your first payment on account for 2007–08 (please include the pence.) £

● Any 2007–08 tax you are reclaiming now £

OTHER INFORMATION *for the year ended 5 April 2007, continued*

Q20 Have you already had any 2006–07 tax refunded or set off by your HM Revenue & Customs office or by Jobcentre Plus?
Read the notes on page 29 of your Tax Return Guide.

YES

If yes, tick this box and then enter the amount of the refund in box 20.1.

20.1 £

Q21 Is your name or address on the front of the Tax Return wrong?
If you are filling in an approved substitute Tax Return, see the notes on page 29 of the Tax Return Guide.

YES

If yes, please tick this box and make any corrections on the front of the form.

Q22 Please give other personal details in boxes 22.1 to 22.7. *This information helps us to be more efficient and effective.*

Your daytime telephone number (including the area code)

22.1

Your adviser's telephone number (including the area code)

22.2

and their name and address

22.3

 Postcode

Your first two forenames

22.4

Say if you are single, married/in a civil partnership, widowed/a surviving civil partner, divorced/civil partnership dissolved or separated

22.5

Your date of birth (If you were born before 6 April 1942, you may get a higher age-related personal allowance.)

22.6 / /

Your National Insurance number (if known and not on page 1 of your Tax Return)

22.7

Q23 If they apply, please tick boxes 23.1 to 23.4, and complete boxes 23.5 to 23.8. Provide any additional information in box 23.9, on page 10.

- If you owe tax for 2006–07 and have a PAYE tax code, we will try and collect the tax due (if it is less than £2,000) through your tax code for 2008–09. Tick box 23.1 if you do **not** want the tax collected through your PAYE tax code *read Key Dates on page 3 of your Tax Return Guide before completing this box.*

23.1

- Tick box 23.1A if you are likely to owe tax for 2007–08 on income other than employed earnings or pensions and you do not want us to use your 2007–08 PAYE tax code to collect that tax during the year

23.1A

- Tick box 23.2 if this Tax Return contains figures that are provisional because you do not yet have final figures. Page 30 of the Tax Return Guide explains the circumstances in which provisional figures may be used and asks for some additional information to be provided in box 23.9, on page 10

23.2

- Tick box 23.3 if you are claiming relief now for 2007–08 trading, or certain capital, losses. Enter in box 23.9 the amount and year

23.3

- Tick box 23.4 if you are claiming to have post-cessation or other business receipts taxed as income of an earlier year. Enter in box 23.9 the amount and year

23.4

- **Disclosure of tax avoidance schemes** - if you are a party to one or more disclosable tax avoidance schemes you must complete boxes 23.5 and 23.6. Give details of each scheme on a separate line. If you are party to more than 3 schemes give further details in the 'Additional information' box, box 23.9, on page 10

Scheme reference number

23.5

Tax year in which the expected advantage arises - year ended 5 April

23.6

- **Business Premises Renovation Allowance (BPPRA)** - Read page 31 of the Guide and enter the amounts of BPPRA included in the capital allowances and balancing charges boxes on the Self-employment and Land and Property Pages

Capital allowance
23.7 £

Balancing charge
23.8 £



OTHER INFORMATION *for the year ended 5 April 2007, continued*

23.9 Additional information

Q24 Declaration

I have filled in and am sending back to you the following Pages:

In the second box enter the number of *complete sets* of supplementary Pages enclosed.

Tick	1 TO 10 OF THIS FORM	<input type="checkbox"/>	Number of sets	<input type="checkbox"/>	PARTNERSHIP	<input type="checkbox"/>	Number of sets	<input type="checkbox"/>	Tick	CAPITAL GAINS	<input type="checkbox"/>
	EMPLOYMENT	<input type="checkbox"/>	<input type="checkbox"/>	LAND & PROPERTY	<input type="checkbox"/>	<input type="checkbox"/>	NON-RESIDENCE ETC.	<input type="checkbox"/>		PENSIONS	<input type="checkbox"/>
	SHARE SCHEMES	<input type="checkbox"/>	Number of sets	FOREIGN	<input type="checkbox"/>	<input type="checkbox"/>					
	SELF-EMPLOYMENT	<input type="checkbox"/>	<input type="checkbox"/>	TRUSTS ETC.	<input type="checkbox"/>	<input type="checkbox"/>					

Before you send your completed Tax Return, you must sign the statement below.

If you give false information or conceal any part of your income or chargeable gains, you may be liable to financial penalties and/or you may be prosecuted.

24.1 The information I have given in this Tax Return is correct and complete to the best of my knowledge and belief.

Signature

Date

There are very few reasons why we accept a signature from someone who is not the person making this Tax Return but if you are signing for someone else please read the notes on page 31 of your Tax Return Guide, and:

enter the capacity in which you are signing (for example, as executor or receiver)

24.2

enter the name of the person you are signing for

24.3

please **PRINT** your name and address in box 24.4

24.4

Postcode

Empty box for additional information.

Empty box for additional information.