

UK employment income, pensions and state benefits

<p>2.1 Total pay from all employments, before tax taken off (from P60/P45)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.2 Tax taken off box 2.1 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.3 State Pension - enter the amount you were entitled to receive in the year not the weekly or 4 weekly amount. Read the R40 notes</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.4 If you do not receive State Pension, put 'X' in the box <input type="checkbox"/></p> <p>2.5 Total of other taxable state benefits</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>2.6 Tax taken off any taxable Incapacity Benefit included in box 2.5</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.7 Total of other pensions and retirement annuities, before tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.8 Tax taken off box 2.7</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>2.9 Flat rate expenses, professional subscriptions, etc</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
---	---

UK interest and dividends

With joint accounts, only enter your share of the interest received.

<p>3.1 Net interest paid by banks, building societies etc, purchased life annuities and PPI payments - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.2 Tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.3 Gross amount - the amount before tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.4 Untaxed interest not included in box 3.3 (if you have more than one account - read the R40 notes for boxes 3.1 to 3.7)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>3.5 UK company dividends (but do not add on the tax credit)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.6 Dividends from UK authorised unit trusts, open-ended investment companies and investment trusts (but do not add on the tax credit)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>3.7 Stock dividends - enter the appropriate amount in cash/cash equivalent of the share capital - without any tax</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
---	---

Trust, settlement and estate income

<p>4.1 Unique Taxpayer Reference (UTR) of the trust</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>4.2 Net amount taxed at trust rate - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.3 Tax paid on box 4.2 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.4 Net amount of non-savings income - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.5 Tax paid or tax credit on box 4.4 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.6 Net amount of savings income - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>4.7 Tax paid on box 4.6 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.8 Net amount of dividend income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.9 Tax credit on box 4.8 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.10 Income payments from settlor-interested trusts</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.11 Net amount of dividend income - after tax taken off</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>4.12 Tax paid on box 4.11 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
---	---

UK land and property

<p>5.1 Income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>5.2 Expenses allowable for tax</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>5.3 Profit</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>5.4 Loss</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>5.5 Land and property losses brought forward from earlier years</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
---	--

Foreign income

Enter the sterling equivalent of your foreign income and tax paid. If there's more than one country of origin, give the additional details on a separate sheet. Enter foreign dividends of £300 or less.

If you're a non-resident landlord, then foreign interest and foreign pensions need to be reported through self-assessment.

<p>6.1 Foreign dividends (net amount)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.2 Foreign tax taken off box 6.1 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.3 Foreign dividends eligible for tax credit (net amount)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.4 Foreign tax taken off box 6.3 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.5 Foreign property income - before expenses</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.6 Foreign property - expenses allowable for tax</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>6.7 Foreign tax taken off box 6.5 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.8 Foreign interest and other savings</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.9 Foreign tax taken off box 6.8 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.10 Foreign pensions and any other foreign income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.11 Foreign tax taken off box 6.10 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>6.12 Country of origin</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
---	--

Any other income and benefits

<p>7.1 Chargeable event gains</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>7.2 Number of years</p> <p><input type="text"/> <input type="text"/></p> <p>7.3 Tax treated as paid on box 7.1 income</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>7.4 Other income and benefits (gross amount)</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>7.5 Tax taken off box 7.4</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>7.6 Description of box 7.4 income</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
---	--

Gift Aid

<p>8.1 Gift Aid payments made in the year of claim</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>8.2 Gift Aid payments made in the year of claim but treated as if made in the preceding year</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>	<p>8.3 Total of any 'one-off' payments included in box 8.1</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p> <p>8.4 Gift Aid payments made after the end of the year of claim but to be treated as if made in that year</p> <p>£ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/></p>
--	---

Blind Person's Allowance

<p>9.1 If you're registered blind (severely sight impaired) with a local authority, or other register, put 'X' in the box</p> <p><input type="checkbox"/></p> <p>Please also consider box 10.6 below</p>	<p>9.2 Enter the name of the local authority, or other register (or 'Scotland' or 'Northern Ireland', as appropriate)</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																																						

Married Couple's Allowance

This allowance is only due if you, or your spouse or civil partner, were born before 6 April 1935.

<p>10.1 To claim the full allowance, enter your spouse's or civil partner's full name</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																																							<p>10.5 Enter the date of the marriage or civil partnership DD MM YYYY</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																			
<p>10.2 If, as a couple, you've already asked us to give all of the minimum amount to your spouse or civil partner, put 'X' in the box</p> <p><input type="checkbox"/></p>	<p>10.6 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 www.gov.uk/government/publications/income-tax-notice-of-transfer-of-surplus-income-tax-allowances-575t and attach it to this claim form.</p>																																																									
<p>10.3 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</p> <p><input type="checkbox"/></p>																																																										
<p>10.4 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</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																																																										

Repayment instructions

<p>11.1 Where should we send the repayment to?</p> <p>Your address <input type="checkbox"/></p> <p>Your nominee's address <input checked="" type="checkbox"/> (go to question 11.2 to 11.3)</p>	<p>11.2 If you would like the payable order to go to your nominee, enter in full the name, address and postcode</p> <table border="1"><tr><td>I</td><td>N</td><td>G</td><td>E</td><td>N</td><td>I</td><td>O</td><td>U</td><td>S</td><td> </td><td>L</td><td>E</td><td>G</td><td>A</td></tr><tr><td>L</td><td>,</td><td>C</td><td>O</td><td>R</td><td>N</td><td>E</td><td>R</td><td>B</td><td>L</td><td>O</td><td>C</td><td>K</td><td>,</td></tr><tr><td>4</td><td>T</td><td>H</td><td> </td><td>F</td><td>L</td><td>O</td><td>O</td><td>R</td><td>,</td><td>Q</td><td>U</td><td>A</td><td>Y</td></tr><tr><td>S</td><td>T</td><td>R</td><td>E</td><td>E</td><td>T</td><td>,</td><td>M</td><td>A</td><td>N</td><td>C</td><td>H</td><td>E</td><td>S</td></tr><tr><td>T</td><td>E</td><td>R</td><td>,</td><td>M</td><td>3</td><td>3</td><td>H</td><td>N</td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>	I	N	G	E	N	I	O	U	S		L	E	G	A	L	,	C	O	R	N	E	R	B	L	O	C	K	,	4	T	H		F	L	O	O	R	,	Q	U	A	Y	S	T	R	E	E	T	,	M	A	N	C	H	E	S	T	E	R	,	M	3	3	H	N					
I	N	G	E	N	I	O	U	S		L	E	G	A																																																										
L	,	C	O	R	N	E	R	B	L	O	C	K	,																																																										
4	T	H		F	L	O	O	R	,	Q	U	A	Y																																																										
S	T	R	E	E	T	,	M	A	N	C	H	E	S																																																										
T	E	R	,	M	3	3	H	N																																																															
	<p>11.3 If your nominee is your adviser, enter their reference</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																																																																						

Declaration - Please make sure that you've read the R40 Notes at section 12.2 before signing

<p>12.1 Sign and date this form and then write your full name (in capital letters) in the space provided</p> <div style="border: 1px solid black; padding: 10px;"><p>The information I've given on this form is correct and complete to the best of my knowledge.</p><p>Signature Date <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table></p><p>Name and title in capital letters</p></div>									<p>12.2 If you've signed on behalf of someone else, enter the capacity, for example, parent, executor, receiver, attorney</p> <table border="1"><tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>																			
	<p>12.3 Tick this box if you do not need a claim form in future</p> <p><input type="checkbox"/></p>																											

Please read the notes on the back before completing this authority. This authority allows us to exchange and disclose information about you with your agent and to deal with them on matters within the responsibility of HM Revenue and Customs (HMRC), as specified on this form. This overrides any earlier authority given to HMRC. We will hold this authority until you tell us that the details have changed.

Please tick the box(es) and provide the reference(s) requested **only** for those matters for which you want HMRC to deal with your agent.

I,
of (name of your business, company or trust if applicable)
authorise HMRC to disclose information to
I agree that the nominated agent has agreed to act on my/our behalf, and the information is correct and complete. The authorisation is limited to the matters shown on the right-hand side of this form.
Signature see note 1 overleaf before signing
Date

Give your personal details or company registered office here

Address
Postcode
Phone number

Give your agent's details here

Address
Postcode
Phone number
Agent codes (SA/CT/PAYE)
Client reference

For official use only

SA <input type="checkbox"/>	____/____/____	COTAX <input type="checkbox"/>	____/____/____
NIRS <input type="checkbox"/>	____/____/____	EBS <input type="checkbox"/>	____/____/____
COP <input type="checkbox"/>	____/____/____	VAT <input type="checkbox"/>	____/____/____
NTC <input type="checkbox"/>	____/____/____	COP link <input type="checkbox"/>	____/____/____

Individual*/Partnership*/Trust* Tax Affairs *select
*delete as appropriate (including National Insurance)

Your National Insurance number (individuals only) If you are self employed tick here

□□ □□ □□ □□ □□

Unique Taxpayer Reference (UTR) (if applicable) If UTR not yet issued tick here

□□□□□□□□ □□□□□□□□

If you are a Self Assessment taxpayer, we will send your Statement of Account to you, but if you would like us to send it to your agent instead, please tick here

Tax credits

Your National Insurance number (only if not entered above)

□□ □□ □□ □□ □□

If you have a joint tax credit claim and the other claimant wants HMRC to deal with this agent, they should sign here

Name

Signature

Joint claimant's National Insurance number

□□ □□ □□ □□ □□

Corporation Tax

Company Registration Number

□□□□□□□□

Company's Unique Taxpayer Reference

□□□□□□□□□□□□

NOTE: Do not complete this section if you are an employee. Only tick the box if you are an employer operating PAYE

Employer PAYE Scheme

Employer PAYE reference

VAT (see notes 2 and 5 overleaf)

VAT Registration Number

□□□□□□□□□□

If not yet registered tick here

1 Who should sign the form

If the authority is for

You, as an individual

A company

A partnership

A trust

Who signs the form

You, for your personal tax affairs

The secretary or other responsible officer of the company

The partner responsible for the partnership's tax affairs. It applies only to the partnership. Individual partners need to sign a separate authority for their own tax affairs

One or more of the trustees

2 What this authority means

For matters other than VAT or tax credits

We will start sending letters and forms to your agent and give them access to your account information online. Sometimes we need to correspond with you as well as, or instead of, your agent.

For example, the latest information on what Self Assessment forms we send automatically can be found on our website, go to www.gov.uk/topic/personal-tax/self-assessment or phone the Self Assessment Helpdesk on **0300 200 3310**.

You will not receive your Self Assessment Statements of Account if you authorise your agent to receive them instead, but paying any amount due is your responsibility.

We do not send National Insurance statements and requests for payment to your agent unless you have asked us if you can defer payment.

Companies do not receive Statements of Account.

For VAT and tax credits

We will continue to send correspondence to you rather than to your agent but we can deal with your agent in writing or by phone on specific matters. If your agent is able to submit VAT returns online on your behalf, you will need to authorise them to do so through our website. For joint tax credit claims, we need both claimants to sign this authority to enable HM Revenue and Customs to deal with your agent.

3 How we use your information

HM Revenue and Customs is a Data Controller under the Data Protection Act 2018. We hold information for the purposes specified in our notification to the Information Commissioner, including the assessment and collection of tax and duties, the payment of benefits and the prevention and detection of crime, and may use this information for any of them.

We may get information about you from others, or we may give information to them. If we do, it will only be as the law permits to:

- check the accuracy of information
- prevent or detect crime
- protect public funds

We may check information we receive about you with what is already in our records. This can include information provided by you, as well as by others, such as other government departments or agencies and overseas tax and customs authorities. We will not give information to anyone outside HM Revenue and Customs unless the law permits us to do so. For more information go to www.gov.uk/hmrc/information-charter

4 Multiple agents

If you have more than one agent (for example, one acting for the PAYE scheme and another for Corporation Tax), please sign one of these forms for each.

5 Where to send this form

When you have completed this form please send it to:

National Insurance Contributions and Employer Office
HM Revenue and Customs
BX9 1AN

There are some exceptions to this to help speed the handling of your details in certain circumstances. If this form:

- accompanies other correspondence, send it to the appropriate HM Revenue and Customs (HMRC) office
- is solely for Corporation Tax affairs, send it to the HMRC office that deals with the company
- is for a High Net Worth customer, send it to the appropriate High Net Worth Unit
- accompanies a VAT Registration application, send it to the appropriate VAT Registration Unit
- has been specifically requested by an HMRC office, send it back to that office