HM Revenue & Customs

Complete these pages for less common types of income, deductions and tax reliefs, and for any other information.

To get notes and helpsheets that will help you fill in this form, go to **www.hmrc.gov.uk/selfassessmentforms**

If you have completed these pages send them to us with your tax return. If you haven't completed these pages you don't need to send these pages back to us.

Other UK income

Interest from gilt-edged and other UK securities, deeply discounted securities and accrued income profits

1 Gilt etc interest after tax taken off

£ _____ . 0 0

2 Tax taken off

£ _____ . 0 0

3 Gross amount before tax

£ _____ . 0 0

Life insurance gains

4 UK life insurance policy etc gains on which tax was treated as paid – the amount of the gain

£ _____ . 0 0

5 Number of years the policy has been held or since the last gain – whichever is less

☐☐

6 UK life insurance policy etc gains where no tax was treated as paid – the amount of the gain

£ _____ . 0 0

7 Number of years the policy has been held or since the last gain – whichever is less

☐☐

8 UK life insurance policy etc gains from voided ISAs

£ _____ . 0 0

9 Number of years the policy was held

☐☐

10 Tax taken off box 8

£ _____ . 0 0

11 Deficiency relief – read the notes

£ _____ . 0 0

Stock dividends, non-qualifying distributions and loans written off

12 Stock dividends – the appropriate amount in cash/ cash equivalent of the share capital – without any tax

£ _____ . 0 0

13 Non-qualifying distributions and close company loans written off or released – read the notes

£ _____ . 0 0

Business receipts taxed as income of an earlier year

14 The amount of post-cessation or other business receipts

£ _____ . 0 0

15 Tax year income to be taxed, for example, 2013–14 YYYY YY

☐☐☐☐ – ☐☐

Share schemes and employment lump sums, compensation and deductions, certain post-employment income and patent royalty payments

1 Share schemes – the taxable amount
– excluding amounts included on your P60 or P45

£ _____ . 0 0

Box 2 is not in use

3 Taxable lump sums and certain income after the end of your job - excluding redundancy and compensation for loss of your job

£ _____ . 0 0

4 Lump sums or benefits received from an Employer Financed Retirement Benefits Scheme excluding pensions

£ _____ . 0 0

5 Redundancy, other lump sums and compensation payments - the amount above the £30,000 exemption - read the notes

£ _____ . 0 0

6 Tax taken off boxes 3 to 5

£ _____ . 0 0

7 If you have left box 6 blank because the tax is included in box 2 on the 'Employment' page, put 'X' in the box

[ ]

8 Exemptions for amounts entered in box 4

£ _____ . 0 0

9 Compensation and lump sums up to £30,000 exemption

£ _____ . 0 0

10 Disability and foreign service deduction – read the notes

£ _____ . 0 0

11 Seafarers' Earnings Deduction – give the names of the ships in the 'Additional information' box on page Ai 4 and enter pay on your 'Employment' page

£ _____ . 0 0

12 Foreign earnings not taxable in the UK – read the notes

£ _____ . 0 0

13 Foreign tax for which tax credit relief not claimed

£ _____ . 0 0

14 Exempt employers' contributions to an overseas pension scheme – read the notes

£ _____ . 0 0

15 UK patent royalty payments made – read the notes

£ _____ . 0 0

Other tax reliefs – read the notes

1 Subscriptions for Venture Capital Trust shares – the amount on which relief is claimed

£ _____ . 0 0

2 Subscriptions for shares under the Enterprise Investment Scheme – the amount on which relief is claimed (and provide more information on page Ai 4)

£ _____ . 0 0

3 Community Investment Tax Relief – the amount on which relief is claimed – read the notes

£ _____ . 0 0

4 Annual payments made – read the notes

£ _____ . 0 0

5 Qualifying loan interest payable in the year – read the notes

£ _____ . 0 0

6 Post-cessation trade relief and certain other losses

£ _____ . 0 0

7 Maintenance payments (maximum £3,140) – only if you or your former spouse or civil partner were born before 6 April 1935 – read the notes

£ _____ . 0 0

8 Payments to a trade union etc. for death benefits – half the amount paid (maximum £100)

£ _____ . 0 0

9 Relief claimed on a qualifying distribution on the redemption of bonus shares or securities

£ _____ . 0 0

10 Subscriptions for shares under the Seed Enterprise Investment Scheme – read the notes

£ _____ . 0 0

11 Social Investment Tax Relief – the amount on which relief is claimed - read the notes

£ _____ . 0 0

Married Couple's Allowance

Please read the notes. If you are the **husband** (marriages up to 5 December 2005), or the **spouse or civil partner with the higher income** (marriages and civil partnerships on or after 5 December 2005), you should complete box 1 and, where appropriate, boxes 2 to 5 and box 9.

If you are the **wife** (marriages up to 5 December 2005), or the **spouse or civil partner with the lower income** (marriages and civil partnerships on or after 5 December 2005), please read the notes to help you fill in boxes 6 to 11.

If you cannot use all of your Married Couple's Allowance or you want your spouse or civil partner to have your surplus allowance, please read the notes and then put 'X' in box 10 or box 11.

If you, or your spouse or civil partner were born before 6 April 1935, complete the relevant boxes

1 Your spouse's or civil partner's full name

2 Their date of birth if older than you (and at least 1 of you was born before 6 April 1935) DD MM YYYY

3 If you have already agreed that half the minimum allowance is to go to your spouse or civil partner, put 'X' in the box

4 If you have already agreed that all of the minimum allowance is to go to your spouse or civil partner, put 'X' in the box

5 If, in the year to 5 April 2015, you lived with any previous spouse or civil partner, enter their date of birth

6 If you have already agreed that half of the minimum allowance is to be given to you, put 'X' in the box

7 If you have already agreed that all of the minimum allowance is to be given to you, put 'X' in the box

8 Your spouse's or civil partner's full name

9 If you were married or formed a civil partnership after 5 April 2014, enter the date of marriage or civil partnership DD MM YYYY

10 If you want to have your spouse's or civil partner's surplus allowance, put 'X' in the box

11 If you want your spouse or civil partner to have your surplus allowance, put 'X' in the box

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Other information

Income Tax losses and Limit on Income Tax relief

Other income losses

1 **Earlier years' losses** – which can be set against certain other income in 2014-15

£ . 0 0

2 **Total unused losses carried forward**

£ . 0 0

Trade losses from a later year

3 **Relief now for 2015–16 trade losses or certain capital losses** – read the notes and specify the source of loss in the 'Additional information' box on page Ai 4

£ . 0 0

4 Enter the amount of relief shown in box 3 which is not subject to the limit on Income Tax reliefs

£ . 0 0

5 Tax year for which you are claiming relief in box 3, for example, 2013–14 YYYY YY

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Limit on Income Tax relief

6 **Amount of payroll giving** – read the notes

£ . 0 0

Pension Savings Tax Charges

Please read the notes.

7 Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

8 Value of pension benefits in excess of your Available Lifetime Allowance, not taken as a lump sum

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

9 Lifetime Allowance tax paid by your pension scheme

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

10 Amount saved towards your pension, in the period covered by this tax return, in excess of the Annual Allowance

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

11 Annual Allowance tax paid or payable by your pension scheme

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

12 Pension scheme tax reference number – read the notes

PSTR [ ][ ][ ][ ][ ][ ][ ][ ][ ]

13 Amount of unauthorised payment from a pension scheme, not subject to surcharge

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

14 Amount of unauthorised payment from a pension scheme, subject to surcharge

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

15 Foreign tax paid on an unauthorised payment (in £ sterling)

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

16 Taxable short service refund of contributions (overseas pension schemes only)

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

17 Taxable lump sum payment (overseas pension schemes only)

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

18 Foreign tax paid (in £ sterling) on boxes 16 and 17

£ [ ][ ][ ][ ][ ][ ][ ][ ] · 0 0

Tax avoidance schemes

19 The scheme reference number or promoter reference number – read the notes

[ ][ ][ ][ ][ ][ ][ ][ ][ ]

[ ][ ][ ][ ][ ][ ][ ][ ][ ]

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20 The tax year in which the expected advantage arises, for example, 2013–14 YYYY YY – read the notes

[ ][ ][ ][ ][ ] – [ ][ ]

[ ][ ][ ][ ][ ] – [ ][ ]

[ ][ ][ ][ ][ ] – [ ][ ]

Additional information

21 Please give any additional information in this space

[   ]

Personal details

22 Your name

[   ]

23 Your Unique Taxpayer Reference (UTR)

[ ][ ][ ][ ][ ][ ] [ ][ ][ ][ ][ ]