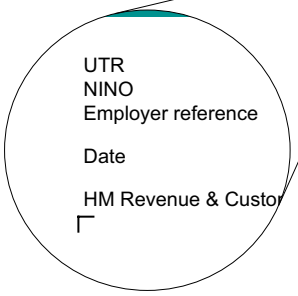
HM Revenue & Customs

Important information to include on your tax return before sending it to us.

Please make sure you include your:

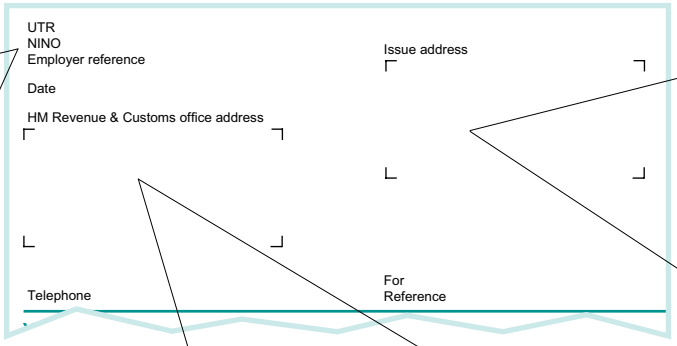
- 10 digit Unique Taxpayer Reference (UTR)
- National Insurance number (NINO)
- employer reference (if you have one)

before sending us your tax return.

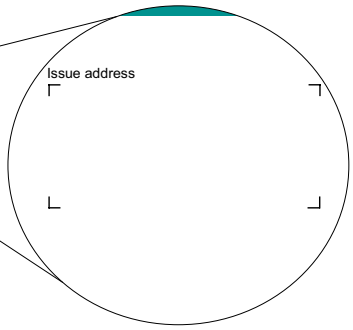


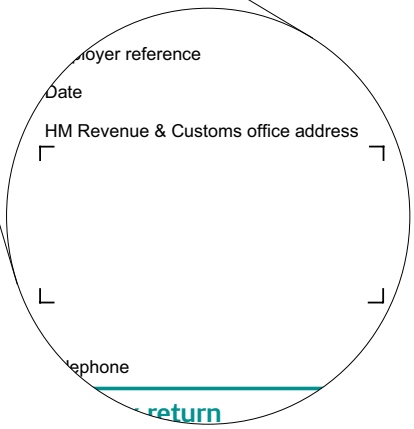
If you don't, we may have to send your tax return back to you, and any repayment due will take longer.

Tax return - Page TR 1



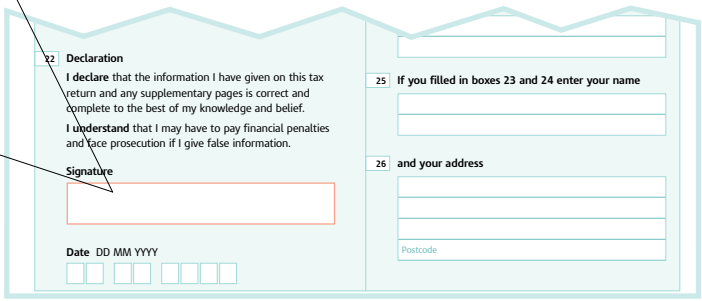
Please make sure you include your full name and address before sending us your tax return.





To find the address of the office to send your tax return to, look on the most recent correspondence from us. If you don't have any recent correspondence from us then send your completed return to:
Self Assessment
HM Revenue & Customs
BX9 1AS
United Kingdom

Please make sure you sign and date the declaration on Page TR 8 of your completed tax return before sending it to us.



Tax return - Page TR 8

Please do not include this information sheet with your tax return.

HM Revenue & Customs

Tax Return 2016

Tax year 6 April 2015 to 5 April 2016 (2015-16)

UTR
NINO
Employer reference

Date

HM Revenue & Customs office address

Telephone

Issue address

For
Reference

Your tax return

This notice requires you, by law, to make a return of your taxable income and capital gains, and any documents requested, for the year from 6 April 2015 to 5 April 2016.

Deadlines

We must receive your tax return by these dates:

- if you are using a **paper** return - by **31 October 2016** (or 3 months after the date of this notice if that's later), or
- if you are filing a return **online** - by **31 January 2017** (or 3 months after the date of this notice if that's later)

If your **return** is late you will be charged a **£100 penalty**. If your return is more than 3 months late, you will be charged daily penalties of £10 a day.

If you **pay** late you will be charged interest and a late payment penalty.

Most people file online

File your tax return with HMRC's free online service. It is simple to use and secure. It even calculates your tax for you so you know what you owe or are owed right away.

Go directly to our official website by typing **www.gov.uk/file-your-self-assessment-tax-return** into your internet browser address bar.

Do not use a search website to find HMRC services online.

To file on paper, please fill in this form using the following rules:

- Enter your figures in whole pounds - ignore the pence
- Round down income and round up expenses and tax paid, it is to your benefit
- If a box does not apply, please leave it blank - do not strike through empty boxes or write anything else

Starting your tax return

Before you start to fill it in, look through your tax return to make sure there is a section for all your income and claims - you may need some separate supplementary pages (see page TR 2 and the Tax Return notes). To get notes and helpsheets that will help you fill in this form, go to **www.gov.uk/self-assessment-forms-and-helpsheets**

Your personal details

1 **Your date of birth** - it helps get your tax right
DD MM YYYY

2 **Your name and address** - if it is different from what is on the front of this form, please write the correct details underneath the wrong ones and put the date you changed address below DD MM YYYY

3 **Your phone number**

4 **Your National Insurance number** - leave blank if the correct number is shown above

What makes up your tax return

To make a **complete** return of your taxable income and gains for the year to 5 April 2016 you may need to complete some **separate supplementary pages**. Answer the following questions by putting 'X' in the 'Yes' or 'No' box.

1 Employment

Were you an employee, director, office holder or agency worker in the year to 5 April 2016? Please read the notes before answering.

Fill in a separate 'Employment' page for each employment, directorship, etc. On each 'Employment' page you complete, enter any other payments, expenses or benefits related to that employment. Say how many 'Employment' pages you are completing in the 'Number' box below.

Yes ☐ No ☐ Number ☐

2 Self-employment

Did you work for yourself (on your 'own account' or in self-employment) in the year to 5 April 2016? (Answer 'Yes' if you were a 'Name' at Lloyd's.)

Fill in a separate 'Self-employment' page for each business. On each 'Self-employment' page you complete, enter any payments or expenses related to that business. Say how many businesses you had in the 'Number' box below.

Yes ☐ No ☐ Number ☐

3 Partnership

Were you in partnership? Fill in a separate 'Partnership' page for each partnership you were a partner in and say how many partnerships you had in the 'Number' box below.

Yes ☐ No ☐ Number ☐

4 UK property

Did you receive any income from UK property (including rents and other UK income from land you own or lease out)? Read the notes if you have furnished holiday lettings.

Yes ☐ No ☐

5 Foreign

If you:

- were entitled to any foreign income, or income gains
- have, or could have, received (directly or indirectly) income, or a capital payment or benefit from a person abroad as a result of any transfer of assets
- want to claim relief for foreign tax paid

read the notes to decide if you have to fill in the 'Foreign' pages. Do you need to fill in the 'Foreign' pages?

Yes ☐ No ☐

6 Trusts etc

Did you receive, or are you treated as having received, income from a trust, settlement or the residue of a deceased person's estate? This does not include cash lump sums/transfer of assets, otherwise known as capital distributions, received under a will.

Yes ☐ No ☐

7 Capital gains summary

If you sold or disposed of any assets (including, for example, stocks, shares, land and property, a business), or had any chargeable gains, read the notes to decide if you have to fill in the 'Capital gains summary' page. If you do, you must also provide separate computations.

Do you need to fill in the 'Capital gains summary' page **and** provide computations?

Yes ☐ No ☐ Computation(s) provided ☐

8 Residence, remittance basis etc

Were you, for all or part of the year to 5 April 2016, one or more of the following:

- not resident
- not domiciled in the UK and claiming the remittance basis
- dual resident in the UK and another country?

Yes ☐ No ☐

9 Additional information

Some less common kinds of income and tax reliefs, for example Married Couple's Allowance, Life insurance gains, chargeable event gains, Seafarer's Earnings Deduction and details of disclosed tax avoidance schemes, should be returned on the 'Additional information' pages. Do you need to fill in the 'Additional information' pages?

Yes ☐ No ☐

If you need more pages

If you answered 'Yes' to any of questions 1 to 9, please check to see if **within this return**, there is a page dealing with that kind of income etc. If there is not, you will need separate supplementary pages. Do you need to get and fill in separate supplementary pages?

Yes ☐ No ☐

If 'Yes', you can go to **www.gov.uk/self-assessment-forms-and-helpsheets** to download them, or phone **0300 200 3610** and ask us for the relevant pages.

Income

Interest and dividends from UK banks, building societies etc

1 **Taxed UK interest etc** - the net amount after tax has been taken off - read the notes

£ . 0 0

2 **Untaxed UK interest etc** - amounts which have not had tax taken off - read the notes

£ . 0 0

3 **Untaxed foreign interest (up to £2,000)** - amounts which have not had tax taken off - read the notes

£ . 0 0

4 **Dividends from UK companies** - the net amount, do not include the tax credit - read the notes

£ . 0 0

5 **Other dividends** - the net amount, do not include the tax credit - read the notes

£ . 0 0

6 **Foreign dividends (up to £300)** - the amount in sterling after foreign tax was taken off. Do not include this amount in the 'Foreign' pages

£ . 0 0

7 **Tax taken off foreign dividends** - the sterling equivalent

£ . 0 0

UK pensions, annuities and other state benefits received

8 **State Pension** - amount you were entitled to receive in the year, **not the weekly or 4-weekly amount** - read the notes

£ . 0 0

9 **State Pension lump sum** - the gross amount of any lump sum - read the notes

£ . 0 0

10 **Tax taken off box 9**

£ . 0 0

11 **Pensions (other than State Pension), retirement annuities and taxable triviality payments** - the gross amount. Tax taken off goes in box 12

£ . 0 0

12 **Tax taken off box 11**

£ . 0 0

13 **Taxable Incapacity Benefit and contribution-based Employment and Support Allowance** - read the notes

£ . 0 0

14 **Tax taken off Incapacity Benefit in box 13**

£ . 0 0

15 **Jobseeker's Allowance**

£ . 0 0

16 **Total of any other taxable State Pensions and benefits**

£ . 0 0

Other UK income not included on supplementary pages

Do not use this section for income that should be returned on supplementary pages. Share schemes, gilts, stock dividends, life insurance gains and certain other kinds of income go on the 'Additional information' pages.

17 **Other taxable income** - before expenses and tax taken off

£ . 0 0

18 **Total amount of allowable expenses** - read the notes

£ . 0 0

19 **Any tax taken off box 17**

£ . 0 0

20 **Benefit from pre-owned assets** - read the notes

£ . 0 0

21 **Description of income in boxes 17 and 20** - if there is not enough space here please give details in the 'Any other information' box, box 19, on page TR 7

Tax reliefs

Paying into registered pension schemes and overseas pension schemes

Do not include payments you make to your employer's pension scheme which are deducted from your pay before tax or payments made by your employer. If your contributions and other pension inputs are more than the Annual Allowance, you should also fill in boxes 10 to 12 on page Ai 4 of the 'Additional information' pages.

1 **Payments to registered pension schemes where basic rate tax relief will be claimed by your pension provider (called 'relief at source'). Enter the payments and basic rate tax**

£ . 0 0

2 **Payments to a retirement annuity contract where basic rate tax relief will not be claimed by your provider**

£ . 0 0

3 **Payments to your employer's scheme which were not deducted from your pay before tax** - this will be unusual - read the notes

£ . 0 0

4 **Payments to an overseas pension scheme, which is not UK-registered, which are eligible for tax relief and were not deducted from your pay before tax**

£ . 0 0

Charitable giving

5 **Gift Aid payments made in the year to 5 April 2016**

£ . 0 0

6 **Total of any 'one-off' payments in box 5**

£ . 0 0

7 **Gift Aid payments made in the year to 5 April 2016 but treated as if made in the year to 5 April 2015**

£ . 0 0

8 **Gift Aid payments made after 5 April 2016 but to be treated as if made in the year to 5 April 2016**

£ . 0 0

9 **Value of qualifying shares or securities gifted to charity**

£ . 0 0

10 **Value of qualifying land and buildings gifted to charity**

£ . 0 0

11 **Value of qualifying investments gifted to non-UK charities in boxes 9 and 10**

£ . 0 0

12 **Gift Aid payments to non-UK charities in box 5**

£ . 0 0

Blind Person's Allowance

13 **If you are registered blind, or severely sight impaired, and your name is on a local authority or other register, put 'X' in the box**

14 **Enter the name of the local authority or other register**

15 **If you want your spouse's, or civil partner's, surplus allowance, put 'X' in the box**

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

Other less common reliefs are on the 'Additional information' pages.

Student Loan repayments

Please read the notes before filling in boxes 1 to 3.

1 **If you have received notification from the Student Loans Company that repayment of an Income Contingent Student Loan began before 6 April 2016, put 'X' in the box**

2 **If your employer has deducted Student Loan repayments enter the amount deducted**

£ . 0 0

3 **If you think your loan may be fully repaid within the next 2 years, put 'X' in the box**

High Income Child Benefit Charge

Fill in this section if all of the following apply:

- your income was over £50,000
- you or your partner (if you have one) got Child Benefit (this also applies if someone else claims Child Benefit for a child who lives with you and pays you or your partner for the child's upkeep)
- **couples only** - your income was higher than your partner's.

Please read the notes. Use the calculator at **www.gov.uk/child-benefit-tax-calculator** to help you work out the Child Benefit payments you received.

If you have to pay this charge for the 2016-17 tax year and you do not want us to use your 2016-17 PAYE tax code to collect that tax during the year, put 'X' in box 3 on page TR 6.

1 **Enter the total amount of Child Benefit you and your partner got for the year to 5 April 2016**

£ . 0 0

2 **Enter the number of children you and your partner got Child Benefit for on 5 April 2016**

3 **Enter the date that you and your partner stopped getting all Child Benefit payments if this was before 6 April 2016**

DD MM YYYY

Marriage Allowance

Please read the notes. If your income for the year ended 5 April 2016 was less than £10,600 you can transfer £1,060 of your Personal Allowance to your spouse or civil partner to reduce the amount of tax they pay if all of the following apply:

- you were married to, or in a civil partnership with, the same person for all or part of the tax year
- you were **both born on or after 6 April 1935**
- your spouse or civil partner's income was less than £42,386

Fill in this section if you want to make the transfer:

1 **Your spouse or civil partner's first name**

2 **Your spouse or civil partner's last name**

3 **Your spouse or civil partner's National Insurance number**

4 **Your spouse or civil partner's date of birth** DD MM YYYY

5 **Date of marriage or civil partnership** DD MM YYYY

Finishing your tax return

Calculating your tax - if we receive this paper tax return by 31 October 2016 or if you file online, we will do the calculation for you and tell you how much you have to pay (or what your repayment will be) before 31 January 2017. We will add the amount due to your Self Assessment Statement, together with any other amounts due. **Do not** enter payments on account, or other payments you have made towards the amounts due, on your tax return. We will deduct these on your Self Assessment Statement. If you want to calculate your tax, ask us for the 'Tax calculation summary' pages and notes. The notes will help you work out any tax due or repayable, and if payments on account are necessary.

Tax refunded or set off

1 **If you have had any 2015–16 Income Tax refunded or set off by us or Jobcentre Plus, enter the amount**

£ . 0 0

If you have not paid enough tax

We recommend you pay any tax due electronically. Read the notes.

2 **You can pay the amount you owe, excluding Class 2 National Insurance contributions, through your wages or pension in the year starting 6 April 2017 if you owe less than £3,000 for the tax year ended 5 April 2016 and send us your paper tax return by 31 October or 30 December 2016 if you file online. If you want us to try to collect what you owe this way you don't need to do anything more. But if you do not want us to do this then put 'X' in the box** - read the notes

3 **We will try to collect tax due for the current tax year (ended 5 April 2017) through your wages or pension during this tax year. We will do this for tax on savings, casual earnings and/or the High Income Child Benefit Charge to reduce the amount you have to pay at the end of the year. If you do not want us to do this then put 'X' in the box** - read the notes

If you have paid too much tax

To claim a repayment, fill in boxes 4 to 14 below. If you paid your tax by credit or debit card, we will always try to repay back to your card first before making any repayment as requested by you below. Please allow up to 4 weeks for any repayment to reach you before contacting HMRC.

4 **Name of bank or building society**

5 **Name of account holder (or nominee)**

6 **Branch sort code**

– –

7 **Account number**

8 **Building society reference number**

9 **If you do not have a bank or building society account, or if you want us to send a cheque to you or to your nominee, put 'X' in the box**

10 **If you have entered a nominee's name in box 5, put 'X' in the box**

11 **If your nominee is your tax adviser, put 'X' in the box**

12 **Nominee's address**

13 **and postcode**

14 **To authorise your nominee to receive any repayment, you must sign in the box. A photocopy of your signature will not do**

Your tax adviser, if you have one

This section is optional. Please read the notes about authorising your tax adviser.

15 **Your tax adviser's name**

16 **Their phone number**

17 **The first line of their address including the postcode**

Postcode

18 **The reference your adviser uses for you**

Any other information

19 **Please give any other information in this space**

Signing your form and sending it back

Please fill in this section and sign and date the declaration at box 22.

20 **If this tax return contains provisional or estimated figures, put 'X' in the box**

21 **If you are enclosing separate supplementary pages, put 'X' in the box**

22 **Declaration**

I declare that the information I have given on this tax return and any supplementary pages is correct and complete to the best of my knowledge and belief.

I understand that I may have to pay financial penalties and face prosecution if I give false information.

Signature

Date DD MM YYYY

23 **If you have signed on behalf of someone else, enter the capacity. For example, executor, receiver**

24 **Enter the name of the person you have signed for**

25 **If you filled in boxes 23 and 24 enter your name**

26 **and your address**

Postcode