HM Revenue & Customs

Additional information

Tax year 6 April 2008 to 5 April 2009

These pages:

- are for less common types of income, deductions and tax reliefs, and for other information
- if completed, are to be sent back with your Tax Return (but we do not want these pages back if you have made no entries on them, please).

If you think you need to complete them, go to **www.hmrc.gov.uk** or ring **0845 9000 404** and ask us for the *Additional information notes*.

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

£ . 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

£ . 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 2007-08 *YYYY YY*

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Share schemes and employment lump sums, compensation and deductions

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

£ • 0 0

2 Tax taken off box 1

£ • 0 0

3 Taxable lump sums - excluding redundancy and compensation for loss of your job - *see notes starting on page AiN 28 and Working Sheet 22*

£ • 0 0

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

£ • 0 0

5 Redundancy and other lump sums and compensation payments

£ • 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 sum £30,000 exemption - *see page AiN 28 of the notes*

£ • 0 0

10 Disability and foreign service deduction

£ • 0 0

11 Seafarers' Earnings Deduction - *the total amount (and give the names of the ships in the 'Additional information' box on page Ai 4)*

£ • 0 0

12 Foreign earnings not taxable in the UK

£ • 0 0

13 Foreign tax for which tax credit relief not claimed

£ • 0 0

14 Exempt employers' contributions to an overseas pension scheme

£ • 0 0

Other tax reliefs

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*

£ • 0 0

4 Annuities and annual payments made

£ • 0 0

5 Qualifying loan interest payable in the year

£ • 0 0

6 Post-cessation expenses and certain other losses

£ • 0 0

7 Maintenance payments (max £2,540) - *only if you or your former spouse or civil partner were born before 6 April 1935*

£ • 0 0

8 Payments to a trade union etc. for death benefits - *half the amount paid (max £100)*

£ • 0 0

9 Relief claimed for employer's compulsory widow's, widower's or orphan's benefit scheme - *(max £20)*

£ • 0 0

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

£ • 0 0

Age related married couple's allowance

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 want to claim or transfer surplus allowances complete box 10 or box 11 as well.

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 on page AiN 36. These notes will help you fill in boxes 6 to 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 one 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 2009, 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 2008, 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

Other information

Income Tax losses

Other income losses

1 Earlier years' losses - *which can be set against certain other income in 2008-09*

£ . 0 0

2 Total unused losses carried forward

£ . 0 0

Trading losses

3 Relief now for 2009-10 trading, or certain capital, losses

£ . 0 0

4 Tax year for which you are claiming relief in box 3, for example 2007-08 *YYYY YY*

Pension savings tax charges and taxable lump sums from overseas pension schemes

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

£ .00

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

£ .00

7 Lifetime Allowance tax paid by your pension scheme

£ .00

8 Amount saved towards your pension, in the period covered by this Tax Return, in excess of the Annual Allowance

£ .00

9 Amount of unauthorised payment from a pension scheme, not subject to Surcharge

£ .00

10 Amount of unauthorised payment from a pension scheme, subject to Surcharge

£ .00

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

£ .00

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

£ .00

13 Taxable lump sum death benefit payment (overseas pension schemes only)

£ .00

14 Foreign tax paid (in £ sterling) on boxes 12 and 13

£ .00

Tax avoidance schemes

15 The scheme reference number

16 The tax year in which the expected advantage arises, for example 2007-08, *YYYY YY*

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Additional information

17 Please give any additional information in this space

Personal details

18 Your name

19 Your unique taxpayer reference (UTR)