

Employer PAYE reference

 /

National Insurance Number

Phone

Phone

Date

Your Pay As You Earn (PAYE) tax code

Your current PAYE tax code may need changing because:

- you have started to receive an occupational or personal pension
- you are nearing State Pension age and may soon be getting your State Pension
- you already receive a pension but you are nearing age 65 (and higher tax allowances may be due).

The information we ask for here will enable us to give you the correct tax allowances for the tax year - a tax year starts on 6 April one year and ends on 5 April the next.

If you do not yet know the details of your pension(s), hold on to the form until you do.

We want you to pay the right amount of tax: failure to complete this form may mean you pay too much, or too little.

If you want a **large print** version of the form, or any help with completing it, please phone us on the number above.

Personal details

Your first name(s)

Your last name

Your contact daytime phone number

 Your date of birth *DD MM YYYY*

If you are married or in a civil partnership, enter your spouse's or civil partner's date of birth *DD MM YYYY*

If your spouse or civil partner has died, enter their date of death *DD MM YYYY*

Charitable giving

If you are 65 or over or if you pay tax at 40%, the charitable payments you make under the Gift Aid scheme can reduce your tax bill.

Gift Aid payments you expect to make this tax year

£ .

Your State Pension

If you do not know the details of your State Pension please hold on to the form until you do.

Weekly amount of State Pension (exclude Pension Credit and Child Dependency Addition, Attendance Allowance and Disability Living Allowance)

£ .

Date your State Pension started DD MM YYYY

If you have deferred your State Pension, put 'X' in this box

Other pensions

Include triviality and wind-up lump sum pension payments but exclude lump sums paid or payable under commutation (when you give up some of your pension to get a lump sum when you retire). Exclude non-taxable war widow's and other war pensions. If you have more than two pensions, include details of the others on page 4.

First pension

Name and address of pension provider

Name
Address
Postcode

Type of pension

Personal pension

Occupational pension

Retirement annuity

Other

Pension number, *if known*

Pension provider's PAYE tax reference, *if known*

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Second pension

Name and address of pension provider

Name
Address
Postcode

Type of pension

Personal pension

Occupational pension

Retirement annuity

Other

Pension number, *if known*

Pension provider's PAYE tax reference, *if known*

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Date pension began DD MM YYYY

Date pension began DD MM YYYY

Amount of current monthly pension
(before tax)

£ .

Amount of current monthly pension
(before tax)

£ .

Jobseeker's Allowance, taxable Incapacity Benefit or Employment and Support Allowance

Your current weekly benefit

£ .

Date benefit started DD MM YYYY

If you receive Jobseeker's Allowance enter 'JSA'; if you receive taxable Incapacity Benefit enter 'TIB'; if you receive Employment and Support Allowance enter 'ESA'.

If you expect this benefit to end, enter the date it will stop being paid DD MM YYYY

Other taxable income

To check you are paying the correct amount of tax, we need to know about any other **taxable** income.

If you are employed now or have been in the last 12 months

Name and address of employer

Name
Address
Postcode

Your works or payroll number

Date you started in this employment
DD MM YYYY

Monthly pay (before tax)

£ .

Date you intend to stop working or the date you ceased working, if in the last 12 months
DD MM YYYY

If you are self-employed

What kind of self-employed work do you do?

When did you start? DD MM YYYY

Your estimated profits for this tax year

£ .

Your 10 digit tax reference (from page 1 of your tax return)

Date you intend to stop working, if applicable
DD MM YYYY

