



Official use
Tax reference
Employer reference

Issue address

Date

Inland Revenue office address

Officer in Charge

L

L

Telephone

For
Reference

Please read this page first

The green arrows and instructions will guide you through your Tax Return.

This Notice requires you by law to send me a Tax Return for the year from 6 April 1999 to 5 April 2000. Give details of all your income and capital gains using:

- this form and any supplementary Pages you need; or
- other Inland Revenue approved forms or software; or
- the Electronic Version of the Tax Return (EVR); or
- the Electronic Lodgement Service (ELS).

Make sure your Tax Return, and any documents asked for, reaches me by:

- the later of **30 September 2000** and **2 months after the date this notice was given** if you want me to calculate your tax, or
- the later of **31 January 2001** and **3 months after the date this notice was given, at the latest**, or you will be liable to an automatic penalty of £100.

Make sure your payment of any tax you owe reaches me by 31 January, or you will have to pay interest and perhaps a surcharge.

All Tax Returns will be checked. Please remember that there are penalties for supplying false information.

Your Tax Return

I have sent you pages 1 to 8 of your Tax Return:

- page 2 tells you about supplementary Pages for some types of income and gains. For example, there are Pages for employment, and for self-employment income
- pages 3 and 4 are for details of other income, for example, pensions and savings
- page 5 is for claiming reliefs
- page 6 is for claiming allowances
- pages 7 and 8 are for other information.

I have included any supplementary Pages I think you need after page 8. You are responsible for making sure you have the right ones. Use page 2 to check.

I have also sent you:

- a Tax Return Guide to help you fill in your Tax Return (read pages 2 to 5 of the Guide before you start), and
- a Tax Calculation Guide to help you if you are calculating your own tax.

If you need help:

- refer to your Tax Return Guide, or
- ring the number above - most questions can be answered by telephone, or
- when the office is closed, phone our Helpline on 0845 9000 444 for general advice. It is open each evening and at weekends, or
- if you do not want to explain your question on the phone, call in at an Inland Revenue Enquiry Centre - look under 'Inland Revenue' in the phone book.

Step 1

Answer Questions 1 to 9 below to find out if you have the right supplementary Pages. Please read pages 6 and 7 of your Tax Return Guide if you need help. The Questions are colour coded to help you identify the supplementary Pages and their guidance notes. If you answer 'No', go to the next question. If you answer 'Yes', you must complete the relevant supplementary Pages. Turn to the back of your Tax Return to see if you have the right ones and look at the back of the Tax Return Guide to see if you have guidance notes to go with them. **Ring the Orderline on 0845 9000 404, or fax on 0845 9000 604 for any you need (open 7 days a week between 8am and 10pm). If I have sent you any Pages you do not need, ignore them.**

Check to make sure you have the right supplementary Pages and then tick the box below.

Q1

Were you an employee, or office holder, or director, or agency worker or did you receive payments or benefits from a former employer (excluding a pension) in the year ended 5 April 2000?

NO YES

EMPLOYMENT YES

Q2

Did you have any taxable income from share options, shares (but this does not include dividends - they go in Question 10) or share related benefits in the year?

NO YES

SHARE SCHEMES YES

Q3

Were you self-employed (but not in partnership)? (Tick 'Yes' if you were a Name at Lloyd's.)

NO YES

SELF-E MPLOYMENT YES

Q4

Were you in partnership?

NO YES

PARTNERSHIP YES

Q5

Did you receive any rent or other income from land and property in the UK?

NO YES

LAND & PROPERTY YES

Q6

Did you have any taxable income from overseas pensions or benefits, or from foreign companies or savings institutions, offshore funds or trusts abroad, or from land and property abroad or gains on foreign insurance policies?

NO YES

Have you or could you have received, or enjoyed directly or indirectly, or benefited in any way from, income of a foreign entity as a result of a transfer of assets made in this or earlier years?

NO YES

Do you want to claim tax credit relief for foreign tax paid on foreign income or gains?

NO YES

FOREIGN YES

Q7

Did you receive, or are you deemed to have, income from a trust, settlement or deceased person's estate?

NO YES

TRUSTS ETC YES

Q8

Capital gains

- Have you disposed of your only or main residence?

If 'Yes', read page 7 of your Tax Return Guide to see if you need the Capital Gains Pages.

NO YES

- Did you dispose of other chargeable assets worth more than £14,200 in total?

NO YES

- Were your total chargeable gains more than £7,100?

NO YES

Please see page 7 of the Tax Return Guide if you wish to claim a capital loss.

CAPITAL GAINS YES

Q9

Are you claiming that you were not resident, or not ordinarily resident, or not domiciled, in the UK, or dual resident in the UK and another country, for all or part of the year?

NO YES

NON-RESIDENCE ETC YES

Step 2

Please use blue or black ink to fill in your Tax Return and please do not include pence Round down, to the nearest pound, your income and capital gains and round up your tax credits and tax deductions.

Now fill in any supplementary Pages BEFORE going to Step 3.

Tick this box when you have filled in your supplementary Pages.

Step 3

Now fill in Questions 10 to 23. If you answer 'No' to a question, go to the next one. If you answer 'Yes', fill in the relevant boxes.

Remember

- You do not have to calculate your tax - I will do it for you if you send your Tax Return to me by 30 September. This will save you time and effort.
- The Tax Calculation Guide I have sent you will help if you decide to calculate the tax yourself.
- You do not have to wait until 30 September 2000, or 31 January 2001, to send me your Tax Return.

INCOME for the year ended 5 April 2000

Q 10 Did you receive any income from UK savings and investments?

NO

YES

If yes, fill in boxes 10.1 to 10.26 as appropriate. Include only your share from any joint savings and investments.

Interest

- Interest from UK banks, building societies and deposit takers

- where **no tax** has been deducted Taxable amount
10.1 £

- where **tax has** been deducted Amount after tax deducted Tax deducted Gross amount before tax
10.2 £ **10.3** £ **10.4** £

- Interest distributions from UK authorised unit trusts and open-ended investment companies (dividend distributions go below) Amount after tax deducted Tax deducted Gross amount before tax
10.5 £ **10.6** £ **10.7** £

- National Savings (other than FIRST Option Bonds and the first £70 of interest from a National Savings Ordinary Account) Taxable amount
10.8 £

- National Savings FIRST Option Bonds Amount after tax deducted Tax deducted Gross amount before tax
10.9 £ **10.10** £ **10.11** £

- Other income from UK savings and investments (except dividends) Amount after tax deducted Tax deducted Gross amount before tax
10.12 £ **10.13** £ **10.14** £

Dividends

- Dividends and other qualifying distributions from UK companies Dividend/distribution Tax credit Dividend/distribution plus credit
10.15 £ **10.16** £ **10.17** £

- Dividend distributions from UK authorised unit trusts and open-ended investment companies Dividend/distribution Tax credit Dividend/distribution plus credit
10.18 £ **10.19** £ **10.20** £

- Scrip dividends from UK companies Dividend Notional tax Dividend plus notional tax
10.21 £ **10.22** £ **10.23** £

- Non-qualifying distributions and loans written off Notional tax Taxable amount
10.24 £ **10.25** £ **10.26** £

INCOME for the year ended 5 April 2000, continued

Q11

Did you receive a taxable UK pension, retirement annuity or Social Security benefit?

NO

YES

If yes, fill in boxes 11.1 to 11.13 as appropriate.

Read the notes on pages 12 to 14 of the Tax Return Guide.

State pensions and benefits

Taxable amount for 1999-2000

● State Retirement Pension (enter the total of your weekly entitlements for the year)	11.1 £		
● Widow's Pension	11.2 £		
● Widowed Mother's Allowance	11.3 £		
● Industrial Death Benefit Pension	11.4 £		
● Jobseeker's Allowance	11.5 £		
● Invalid Care Allowance	11.6 £		
● Statutory Sick Pay and Statutory Maternity Pay paid by the Department of Social Security	11.7 £		
		Tax deducted	Gross amount before tax
● Taxable Incapacity Benefit	11.8 £	11.8 £	11.9 £

Other pensions and retirement annuities

● Pensions (other than State pensions) and retirement annuities	Amount after tax deducted 11.10 £	Tax deducted 11.11 £	Gross amount before tax 11.12 £
● Deduction - see the note for box 11.13 on page 14 of your Tax Return Guide	Amount of deduction 11.13 £		

Q12

Did you receive any of the following kinds of income?

NO

YES

If yes, fill in boxes 12.1 to 12.15 as appropriate.

	Income receivable	Exempt amount	Income <i>minus</i> exempt amount
● Taxable maintenance or alimony	12.1 £	12.2 £	12.3 £
● Gains on UK annuities and friendly societies' life insurance policies where no tax is treated as paid	Number of years 12.4		Amount of gain(s) 12.5 £
● Gains on UK life insurance policies etc. on which tax is treated as paid - read page 15 of the Tax Return Guide	Number of years 12.6	Tax treated as paid 12.7 £	Amount of gain(s) 12.8 £
● Gains on life insurance policies in ISAs that have been made void	Number of years 12.9	Tax deducted 12.10 £	Amount of gain(s) 12.11 £
● Corresponding deficiency relief	Amount 12.12 £		
● Refunds of surplus funds from additional voluntary contributions	Amount received 12.13 £	Notional tax 12.14 £	Amount plus notional tax 12.15 £

Q13

Did you receive any other income which you have not already entered elsewhere in your Tax Return?

NO

YES

If yes, fill in boxes 13.1 to 13.6 as appropriate.

Make sure you fill in any supplementary Pages before answering Question 13.

● Other income (read page 16 of your Tax Return Guide if you made losses)	Amount after tax deducted 13.1 £	Tax deducted 13.2 £	Amount before tax 13.3 £
		Losses brought forward 13.4 £	Earlier years' losses used in 1999-2000 13.5 £
		1999-2000 losses carried forward 13.6 £	

RELIEFS for the year ended 5 April 2000

Q 14

Do you want to claim relief for pension contributions?

NO

YES

If yes, fill in boxes 14.1 to 14.17 as appropriate.

Do not include contributions deducted from your pay by your employer to their pension scheme, because tax relief is given automatically. But **do include** your contributions to personal pension schemes and free-standing AVC schemes.

Retirement annuity contracts

Qualifying payments made in 1999-2000

14.1 £

1999-2000 payments used in an earlier year

14.2 £

Relief claimed

box 14.1 minus (boxes 14.2 and 14.3, but not 14.4)

1999-2000 payments now to be carried back

14.3 £

Payments brought back from 2000-2001

14.4 £

14.5 £

Self-employed contributions to personal pension plans

Qualifying payments made in 1999-2000

14.6 £

1999-2000 payments used in an earlier year

14.7 £

Relief claimed

box 14.6 minus (boxes 14.7 and 14.8, but not 14.9)

1999-2000 payments now to be carried back

14.8 £

Payments brought back from 2000-2001

14.9 £

14.10 £

Employee contributions to personal pension plans (include your gross contribution - see the note on box 14.11 in your Tax Return Guide)

Qualifying payments made in 1999-2000

14.11 £

1999-2000 payments used in an earlier year

14.12 £

Relief claimed

box 14.11 minus (boxes 14.12 and 14.13, but not 14.14)

1999-2000 payments now to be carried back

14.13 £

Payments brought back from 2000-2001

14.14 £

14.15 £

Contributions to other pension schemes and free-standing AVC schemes

- Amount of contributions to employer's schemes **not deducted** at source from pay

14.16 £

- Gross amount of free-standing additional voluntary contributions paid in 1999-2000

14.17 £

Q 15

Do you want to claim any of the following reliefs?

NO

YES

If yes, fill in boxes 15.1 to 15.12, as appropriate.

- Payments you made for vocational training (read the box 15.1 note on page 20 of your Tax Return Guide)

Amount of payment

15.1 £

- Interest eligible for relief on loans to buy your main home (other than MIRAS)

Amount of payment

15.2 £

- Interest eligible for relief on other qualifying loans

Amount of payment

15.3 £

- Maintenance or alimony payments you have made under a court order, Child Support Agency assessment or legally binding order or agreement

Amount claimed under 'new' rules

15.4 £

Amount claimed under 'old' rules up to £1,970

15.5 £

Amount claimed under 'old' rules over £1,970

15.6 £

- Subscriptions for Venture Capital Trust shares (up to £100,000)

Amount on which relief claimed

15.7 £

- Subscriptions under the Enterprise Investment Scheme (up to £150,000)

Amount on which relief claimed

15.8 £

- Charitable covenants or annuities

Amount of payment

15.9 £

- Gift Aid and Millennium Gift Aid

Amount of qualifying payments

15.10 £

- Post-cessation expenses, pre-incorporation losses brought forward and losses on relevant discounted securities, etc.

Amount of payment

15.11 £

- Payments to a trade union or friendly society for death benefits

Half amount of payment

15.12 £

ALLOWANCES for the year ended 5 April 2000

Q16 You get your personal allowance of £4,335 automatically. If you were born before 6 April 1935, enter your date of birth in box 21.4 - you may get higher age-related allowances.

Do you want to claim any of the following allowances?

NO

YES

If yes, please read pages 23 to 26 of your Tax Return Guide and then fill in boxes 16.1 to 16.28 as appropriate.

Date of registration (if first year of claim)

Local authority (or other register)

Blind person's allowance

16.1 / /

16.2

Transitional allowance (for some wives with husbands on low income if received in earlier years).

● Tick to claim and give details in the 'Additional information' box on page 8 (please see page 23 of your Tax Return Guide for what is needed)

16.3

● If you want to calculate your tax, enter the amount of transitional allowance you can have in box 16.4

16.4 £

Married couple's allowance for a married man - see page 24 of your Tax Return Guide.

● Wife's full name

16.5

● Date of marriage (if after 5 April 1999)

16.6 / /

● Wife's date of birth (if before 6 April 1935)

16.7 / /

● Tick box 16.8 if you or your wife have allocated **half** the allowance to her

16.8

box number 16.9 is not used

● Tick box 16.10 if you and your wife have allocated **all** the allowance to her

16.10

Married couple's allowance for a married woman - see page 24 of your Tax Return Guide.

● Husband's full name

16.12

● Date of marriage (if after 5 April 1999)

16.11 / /

box number 16.14 is not used

● Tick box 16.13 if you or your husband have allocated **half** the allowance to you

16.13

● Tick box 16.15 if you and your husband have allocated **all** the allowance to you

16.15

Additional personal allowance (available in some circumstances if you have a child living with you - see page 25 of your Tax Return Guide).

● Tick box 16.16A if you are claiming the married couple's allowance **and** additional personal allowance because your spouse was unable to look after themselves because of illness or disablement, throughout the year ended 5 April 2000

16.16A

● Name of the child claimed for

16.16

● Child's date of birth

16.17 / /

● Tick if child lived with you for at least part of the year ended 5 April 2000

16.18

● Name of university etc/type of training if the child is 16 or over on 6 April 1999 and in full time education or training

16.19

Sharing a claim

Name and address of other person claiming

16.20

Postcode

● Enter your share as a percentage

16.21 %

● If share not agreed, enter the number of days in the year ended 5 April 2000 that the child lived with

- you **16.22** days

- other person **16.23** days

Widow's bereavement allowance

● Date of your husband's death

16.24 / /

Transfer of surplus allowances - see page 26 of your Tax Return Guide before you fill in boxes 16.25 to 16.28.

● Tick if you want your spouse to have your unused allowances

16.25

● Tick if you want to have your spouse's unused allowances

16.26

Please give details in the 'Additional information' box on page 8 - see page 26 of your Tax Return Guide for what is needed.

If you want to calculate your tax, enter the amount of the surplus allowance you can have.

● Blind person's surplus allowance

16.27 £

● Married couple's surplus allowance

16.28 £

OTHER INFORMATION for the year ended 5 April 2000

Q17

Have you already had any 1999-2000 tax refunded or set off by your Inland Revenue office or the Benefits Agency (in Northern Ireland, the Social Security Agency)? *Read the notes on page 26 of your Tax Return Guide*

NO YES

If yes, enter the amount of the refund in box 17.1.

17.1 £

Q18

Do you want to calculate your tax?

NO YES

If yes, do it now and then fill in boxes 18.1 to 18.9. Your Tax Calculation Guide will help.

• Unpaid tax for earlier years included in your tax code for 1999-2000

18.1 £

• Tax due for 1999-2000 included in your tax code for a later year

18.2 £

• Total tax and Class 4 NIC due for 1999-2000 before you made any payments on account (put the amount in brackets if an overpayment)

18.3 £

• Tax due for earlier years

18.4 £

• Tick box 18.5 if you have calculated tax overpaid for earlier years (and enter the amount in the 'Additional information' box on page 8)

18.5

• Your first payment on account for 2000-2001 (include the pence)

18.6 £

Tick box 18.7 if you are making a claim to reduce your 2000-2001 payments on account and say why in the 'Additional information' box

18.7

Tick box 18.8 if you do not need to make 2000-2001 payments on account

18.8

• Tick box 18.9 if you are reclaiming 2000-2001 tax now (and enter the amount in the 'Additional information' box on page 8)

18.9

Q19

Do you want to claim a repayment if you have paid too much tax? (If you tick 'No' or the tax you have overpaid is below £10, I will use the amount you are owed to reduce your next tax bill.)

NO YES

If yes, fill in boxes 19.1A to 19.12 as appropriate.

Should the repayment be sent:

• direct to your bank or building society account?

Tick box 19.1A and fill in boxes 19.3 to 19.7

19.1A

or

by cheque to you at your home address?

Tick box 19.1B

19.1B

OR

• to a nominee? Tick box 19.2 and fill in boxes 19.3 to 19.12 as appropriate

19.2

Fill in boxes 19.3 to 19.7 if the repayment is to be sent to your own, or your nominees' bank or building society account

Name of bank or building society

19.3

Branch sort code

19.4

Account number

19.5

Name of account

19.6

Building society ref.

19.7

• If your nominee is your agent, tick box 19.8

19.8

Agent's reference for you (if your agent is your nominee)

19.9

Name of your nominee/agent

I authorise

19.10

Nominee/agent address

19.11

Postcode

to receive on my behalf the amount due

This authority must be signed by you. A photocopy of your signature will not do.

19.12

Signature

Q20

Are your details on the front of the Tax Return wrong?

NO YES

If yes, please make any corrections on the front of the form.

Q21

Please give other personal details in boxes 21.1 to 21.6. This information helps us to be more efficient and effective and may support claims you have made elsewhere in your Tax Return

Please give a daytime telephone number if convenient. It is often simpler to phone if we need to ask you about your Tax Return.

Your telephone number

21.1

or, if you prefer,

your agent's

telephone number

21.2

(also give your agent's name and reference in the 'Additional information' box on page 8)

Enter your first two forenames

21.5

Say if you are single, married, widowed, divorced or separated

21.3

Date of birth

21.4

Enter your date of birth if you are self-employed, or you were born before 6 April 1935, or you have ticked the 'Yes' box in Question 14, or you are claiming relief for Venture Capital Trust subscriptions

Enter your National Insurance number (if known)

21.6

Q 22 Please tick boxes 22.1 to 22.5 if they apply and provide any additional information in the box below.

Tick box 22.1 if you expect to receive a new pension or Social Security benefit in 2000-2001. **22.1**

Tick box 22.2 if you do **not** want any tax you owe for 1999-2000 collected through your tax code. **22.2**

Tick box 22.3 if this Tax Return contains figures that are provisional because you do not yet have final figures. Page 27 of your Tax Return Guide explains the circumstances in which Tax Returns containing provisional figures may be accepted and tells you what you must enter in the box below. **22.3**

box number 22.4 is not used

Tick box 22.5 if you want to claim:

- relief now for 2000-2001 trading or certain capital losses. Enter the amount and year in the 'Additional information' box below
- to have post-cessation or other business receipts taxed as income of an earlier year. Enter the amount and year in the 'Additional information' box below
- backwards or forwards spreading of literary or artistic income. Enter in the 'Additional information' box details of any amounts spread back to last year and, if appropriate, the year before
- for a payment to your employer's compulsory widow's, widower's or orphan's benefit scheme (available in some circumstances – read the notes on page 27 of your Tax Return Guide **before** you tick the box). Enter the amount, in terms of tax, in the 'Additional information' box below. **22.5**

Additional information

Q 23 Declaration

I have filled in and am sending back to you the following pages:

Tick <div style="background-color: #002060; color: white; padding: 2px; text-align: center;">1 TO 8 OF THIS FORM</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	Tick <div style="background-color: #008080; color: white; padding: 2px; text-align: center;">PARTNERSHIP</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	Tick <div style="background-color: #804020; color: white; padding: 2px; text-align: center;">TRUSTS ETC</div> <input style="width: 20px; height: 15px;" type="checkbox"/>
<div style="background-color: #FF0080; color: white; padding: 2px; text-align: center;">EMPLOYMENT</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	<div style="background-color: #FF0000; color: white; padding: 2px; text-align: center;">LAND & PROPERTY</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	<div style="background-color: #008080; color: white; padding: 2px; text-align: center;">CAPITAL GAINS</div> <input style="width: 20px; height: 15px;" type="checkbox"/>
<div style="background-color: #FF8C00; color: white; padding: 2px; text-align: center;">SELF-EMPLOYMENT</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	<div style="background-color: #808000; color: white; padding: 2px; text-align: center;">FOREIGN</div> <input style="width: 20px; height: 15px;" type="checkbox"/>	<div style="background-color: #006400; color: white; padding: 2px; text-align: center;">NON-RESIDENCE ETC</div> <input style="width: 20px; height: 15px;" type="checkbox"/>

Before you send your completed Tax Return back to your Inland Revenue office, you must sign the statement below. If you give false information or conceal any part of your income or chargeable gains, you may be liable to financial penalties and/or you may be prosecuted.

23.1 The information I have given in this Tax Return is correct and complete to the best of my knowledge and belief.

Signature Date

If you have signed for someone else, please also:

- state the capacity in which you are signing (for example, as executor or receiver)

23.2

- give the name of the person you are signing for and **your** name and address in the 'Additional information' box above.