



UTR
Tax reference
Employer reference

Issue address

Date

Inland Revenue office address

Officer in Charge

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 2000 to 5 April 2001. 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
- our Self Assessment (SA) by Internet Service, or
- our Electronic Lodgement Service (ELS).

Make sure your Tax Return, and any documents I ask for, reach me by:

- the later of **30 September 2001** and **2 months after the date this notice was given** if you want me to calculate your tax, or
- the later of **31 January 2002** 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 2002, or you will have to pay interest and perhaps a surcharge.

Any Tax Return may 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.

Also, unless I know you have a tax adviser, I have 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 do want them, call our Orderline, or download them from our website; see Step 1 on page 2 for details.

If you need help:

- refer to the 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, 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. (Ask the Orderline for one if I haven't sent you one with your Tax Return). 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 (closed Christmas Day, Boxing Day and New Year's Day).** Or you can download from our website at <http://www.inlandrevenue.gov.uk/sa> 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 2001?

NO YES

EMPLOYMENT YES

Q2

Did you have any taxable income from share options, shares or share related benefits in the year? (This does not include - dividends, or - dividend shares ceasing to be subject to an Inland Revenue approved all-employee share plan within 3 years of acquisition they go in Question 10.)

NO YES

SHARE SCHEMES YES

Q3

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

NO YES

SELF-EMPLOYMENT 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 the residue of a deceased person's estate?

NO YES

TRUSTS ETC YES

Q8

Capital gains - read the guidance on page 7 of the Tax Return Guide.

• If you have disposed of your only or main residence do you need the Capital Gains Pages?

NO YES

• Did you dispose of other chargeable assets worth more than £14,400 in total?

NO YES

• Were your total chargeable gains more than £7,200 or do you want to make a claim or election for the year?

NO YES

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.

Fill in any supplementary Pages BEFORE going to Step 3.

When you have filled in your supplementary Pages tick this box.

Step 3

Fill in Questions 10 to 24. 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 reach me by 30 September. This will save you time and effort.
- The Tax Calculation Guide will help you if you decide to calculate the tax yourself.
- You do not have to wait until 30 September 2001, or 31 January 2002, to send me your Tax Return.

INCOME for the year ended 5 April 2001

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 Fixed Rate Savings Bonds and the first £70 of interest from a National Savings Ordinary Account) Taxable amount
10.8 £

- National Savings FIRST Option and Fixed Rate Savings 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 2001, continued

Q11

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

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

NO

YES

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

State pensions and benefits

Taxable amount for 2000-2001

● State Retirement Pension (enter the total of your 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	£	11.9 £

Other pensions and retirement annuities

● Pensions (other than State pensions) and retirement annuities	Amount after tax deducted	Tax deducted	Gross amount before tax
	11.10 £	11.11 £	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 gains on UK life policies or refunds of surplus funds from AVCs?

NO

YES

If yes, fill in boxes 12.1 to 12.12 as appropriate.

● Gains on UK annuities and friendly societies' life insurance policies where no tax is treated as paid	Number of years		Amount of gain(s)
	12.1		12.2 £
● Gains on UK life insurance policies etc. on which tax is treated as paid - read pages 14 and 15 of the Tax Return Guide	Number of years	Tax treated as paid	Amount of gain(s)
	12.3	12.4 £	12.5 £
● Gains on life insurance policies in ISAs that have been made void	Number of years	Tax deducted	Amount of gain(s)
	12.6	12.7 £	12.8 £
● Corresponding deficiency relief	Amount		
	12.9 £		
● Refunds of surplus funds from additional voluntary contributions	Amount received	Notional tax	Amount plus notional tax
	12.10 £	12.11 £	12.12 £

Q13

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

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

NO

YES

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

● Other taxable income (read page 17 of your Tax Return Guide if you made losses)	Amount after tax deducted	Tax deducted	Amount before tax
	13.1 £	13.2 £	13.3 £
		Losses brought forward	Earlier years' losses used in 2000-2001
		13.4 £	13.5 £
		2000-2001 losses carried forward	
		13.6 £	

RELIEFS for the year ended 5 April 2001

Q14

Do you want to claim relief for pension contributions?

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

NO

YES

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

Retirement annuity contracts

Qualifying payments made in 2000-2001 **14.1** £

2000-2001 payments used in an earlier year **14.2** £

2000-2001 payments now to be carried back **14.3** £

Payments brought back from 2001-2002 **14.4** £

Relief claimed
box 14.1 minus (boxes 14.2 and 14.3, but not 14.4)
14.5 £

Self-employed contributions to personal pension plans

Qualifying payments made in 2000-2001 **14.6** £

2000-2001 payments used in an earlier year **14.7** £

2000-2001 payments now to be carried back **14.8** £

Payments brought back from 2001-2002 **14.9** £

Relief claimed
box 14.6 minus (boxes 14.7 and 14.8, but not 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 2000-2001 **14.11** £

2000-2001 payments used in an earlier year **14.12** £

2000-2001 payments now to be carried back **14.13** £

Payments brought back from 2001-2002 **14.14** £

Relief claimed
box 14.11 minus (boxes 14.12 and 14.13, but not 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 2000-2001 **14.17** £

Q15

Do you want to claim any of the following reliefs?

If you have made any Gift Aid payments or other annual payments, after basic rate tax, answer 'Yes' to Question 15 and fill in boxes 15.6 and 15.9, as appropriate.

NO

YES

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

Payments you made to a non-UK training provider for NVQ/SVQ training undertaken outside the UK (read the box 15.1 note on page 20 of your Tax Return Guide) Amount of payment **15.1** £

Interest eligible for relief on qualifying loans Amount of payment **15.2** £

Maintenance or alimony payments you have made under a court order, Child Support Agency assessment or legally binding order or agreement (see page 21 of your Tax Return Guide) Amount claimed up to £2,000 **15.3** £

Subscriptions for Venture Capital Trust shares (up to £100,000) Amount on which relief is claimed **15.4** £

Subscriptions under the Enterprise Investment Scheme (up to £150,000) Amount on which relief is claimed **15.5** £

Gift Aid and payments under charitable covenants Amount on which relief is claimed **15.6** £

Gifts of qualifying investments to charities Amount of relief claimed **15.7** £

Post-cessation expenses, pre-incorporation losses brought forward and losses on relevant discounted securities, etc. (see page 22 of your Tax Return Guide) Amount of payment **15.8** £

Annuities Amount on which relief is claimed **15.9** £

Payments to a trade union or friendly society for death benefits Half amount of payment **15.10** £

Payment to your employer's compulsory widow's, widower's or orphan's benefit scheme (available in some circumstances - first read the notes on page 23 of your Tax Return Guide) Relief claimed **15.11** £

Relief claimed on a qualifying distribution on the redemption of bonus shares or securities. Relief claimed **15.12** £

ALLOWANCES for the year ended 5 April 2001

Q16

You get your personal allowance of £4,385 automatically. If you were born before 6 April 1936, enter your date of birth in box 22.6 - you may get a higher age-related personal allowance.

Do you want to claim any of the following allowances?

NO

YES

If yes, please read pages 23 to 25 of your Tax Return Guide and then fill in boxes 16.1 to 16.18 as appropriate.

■ **Blind person's allowance**

Date of registration
(if first year of claim)
16.1 / /

Local authority (or other register)
16.2 / /

■ **Married couple's allowance** - In 2000-2001 married couple's allowance can only be claimed if either you, or your husband or wife, were born before 6 April 1935. So you can only claim the allowance in 2000-2001 if either of you had reached 65 years of age before 6 April 2000. Further guidance is given beginning on page 23 of your Tax Return Guide.

If both you and your husband or wife were born after 5 April 1935 you cannot claim; do not complete boxes 16.3 to 16.13.

If you can claim fill in boxes 16.3 and 16.4 if you are a married man or if you are a married woman and you are claiming half or all of the married couple's allowance.

● Enter your date of birth (if born before 6 April 1935) **16.3** / /

● Enter your spouse's date of birth (if born before 6 April 1935 and if older than you) **16.4** / /

Then, if you are a married man fill in boxes 16.5 to 16.9. If you are a married woman fill in boxes 16.10 to 16.13.

● Wife's full name **16.5** / /

● Date of marriage (if after 5 April 2000) **16.6** / /

● Tick box 16.7 if you or your wife have allocated half the allowance to her **16.7**

● Tick box 16.8 if you and your wife have allocated all the allowance to her **16.8**

● Enter in box 16.9 the date of birth of any previous wife with whom you lived at any time during 2000-2001. Read 'Special rules if you are a man who married in the year ended 5 April 2001' on page 25 before completing box 16.9. **16.9** / /

● Tick box 16.10 if you or your husband have allocated half the allowance to you **16.10**

● Tick box 16.11 if you and your husband have allocated all the allowance to you **16.11**

● Husband's full name **16.12** / /

● Date of marriage (if after 5 April 2000) **16.13** / /

■ **Widow's bereavement allowance** - see page 25 of your Tax Return Guide before completing box 16.14.

● Date of your husband's death **16.14** / /

■ **Transfer of surplus allowances** - see page 25 of your Tax Return Guide before you fill in boxes 16.15 to 16.18.

● Tick box 16.15 if you want your spouse to have your unused allowances **16.15**

● Tick box 16.16 if you want to have your spouse's unused allowances **16.16**

Please give details in the 'Additional information' box, box 23.6, on page 8 - see page 25 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 **16.17** £

● Married couple's surplus allowance **16.18** £

Q17

Are you liable to make Student Loan Repayments for 2000-2001 on an Income Contingent Student Loan?

Read the note on page 25 of your Tax Return Guide.

NO

YES

If yes, and you are calculating your tax enter in box 18.2A the amount you work out is repayable in 2000-2001.

OTHER INFORMATION for the year ended 5 April 2001

Q 18 Do you want to calculate your tax and any Student Loan Repayment?

NO

YES

If yes, do it now and then fill in boxes 18.1 to 18.8. Your Tax Calculation Guide will help.

- Unpaid tax for earlier years included in your tax code for 2000-2001 18.1 £
- Tax due for 2000-2001 included in your tax code for a later year 18.2 £
- Student Loan Repayment due 18.2A £
- Total tax, Class 4 NIC and Student Loan Repayment due for 2000-2001 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, box 23.6 on page 8. 18.5
- Your first payment on account for 2001-2002 (include the pence) 18.6 £
Tick box 18.7 if you are making a claim to reduce your 2001-2002 payments on account and say why in the 'Additional information' box, box 23.6, on page 8 18.7
- Tick box 18.8 if you are reclaiming any 2001-2002 tax now and enter the amount in the 'Additional information' box, box 23.6 on page 8. 18.8

Q 19 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? 19.1A
Tick box 19.1A and fill in boxes 19.3 to 19.7
- by cheque to you at your home address? 19.1B
Tick box 19.1B
- or
- to a nominee? *Tick box 19.2, fill in boxes 19.3 to 19.11, as appropriate, and box 19.12* 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 holder	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 nominee is your agent) 19.9

Name of your nominee/agent 19.10

I authorise 19.11

Nominee/agent address 19.12

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

Q 20 Have you already had any 2000-2001 tax refunded or set off by your Inland Revenue office or the Benefits Agency (in Northern Ireland, the Social Security Agency)?

NO

YES

If yes, enter the amount of the refund in box 20.1.

Read the notes on page 26 of your Tax Return Guide

20.1 £

Q 21 Are your name or address on the front of the Tax Return wrong?

NO

YES

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

Q 22 Please give other personal details in boxes 22.1 to 22.7. 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 22.1

or, if you prefer, your agent's telephone number 22.2

and their name and address 22.3

Postcode

Enter your first two forenames 22.4

Say if you are single, married, widowed, divorced or separated 22.5

Enter your date of birth 22.6 / /

Enter your National Insurance number (if known) 22.7

OTHER INFORMATION for the year ended 5 April 2001, continued

Q 23 Please tick boxes 23.1 to 23.5 if they apply. Provide any additional information in box 23.6 below.

Tick box 23.1 if you expect to receive a new pension or new Social Security benefit in 2001-2002. **23.1**

Tick box 23.2 if you do **not** want any tax you owe for 2000-2001 collected through your tax code. **23.2**

Tick box 23.3 if this Tax Return contains figures that are provisional because you do not yet have final figures. Page 26 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 box 23.6 below. **23.3**

Tick box 23.4 if you are claiming relief now for 2001-2002 trading, or certain capital, losses. Enter in box 23.6 the amount and year. **23.4**

Tick box 23.5 if you are claiming:

- to have post-cessation or other business receipts taxed as income of an earlier year. Enter in box 23.6 the amount and year
 - backwards or forwards spreading of literary or artistic income. Enter in box 23.6 details of any amounts spread back to last year and, if appropriate, the year before.
- 23.5**
-

23.6 Additional information

Q 24 Declaration

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

1 TO 8 OF THIS FORM

EMPLOYMENT

SHARE SCHEMES

SELF-EMPLOYMENT

PARTNERSHIP

LAND & PROPERTY

FOREIGN

TRUSTS, ETC

CAPITAL GAINS

NON-RESIDENCE, ETC

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.

24.1 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 are signing for someone else please read the notes on page 27 of the Tax Return Guide, and:

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

24.2

- give the name of the person you are signing for and your name and address in box 23.6 above.