



Additional information

Tax year 6 April 2019 to 5 April 2020 (2019–20)

Your name	Your Unique Taxpayer Reference (UTR)

Complete these pages for less common types of income, deductions and tax reliefs, and for any other information. For help filling in this form, go to www.gov.uk/taxreturnforms and read the notes and helpsheets.

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 £ .	3 Gross amount before tax £ .
2 Tax taken off £ .	

Gains from life insurance policies, capital redemption policies and life annuity contracts

4	UK policy or contract gains on which tax was treated as paid – the amount of the gain	£ .
5	Number of years the policy has been held or since the last gain	
6	UK policy or contract gains where no tax was treated as paid – the amount of the gain	£ .
7	Number of years the policy has been held or since the last gain	
8	UK policy or contract gains from voided ISAs	£ .
9	Number of years the policy was held	
10	Tax taken off gain shown in box 8	£ .
11	Deficiency relief	£ .

Stock dividends, bonus issues of securities and redeemable shares

12 Stock dividends – the amount received £ . 0 0	13.1 Close company loans written off or released £ . 0 0
13 Bonus issues of securities and redeemable shares £ . 0 0	

Business receipts taxed as income of an earlier year

14 The amount of post-cessation or other business receipts £ .	15 Tax year income to be taxed, for example, 2018–19 YYYY YY —
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Share schemes and employment lump sums, compensation and deductions, certain post-employment income and patent royalty payments

[illegible]

Other tax reliefs – read the notes

1	Subscriptions for Venture Capital Trust shares – the amount on which relief is claimed	£ .
2	Subscriptions for shares under the Enterprise Investment Scheme – the amount on which relief is claimed	£ .
3	Community Investment Tax Relief – the amount on which relief is claimed	£ .
4	Annual payments made	£ .
5	Qualifying loan interest payable in the year	£ .
6	Post-cessation trade relief and certain other losses	£ .
7	Maintenance payments (up to £3,450) – if you or your former spouse or civil partner were born before 6 April 1935	£ .
8	Payments to a trade union for death benefits – half the amount paid (maximum £100)	£ .
9	Relief claimed on a qualifying distribution on the redemption of bonus shares or securities	£ .
10	Subscriptions for shares under the Seed Enterprise Investment Scheme	£ .
11	Social Investment Tax Relief – the amount on which relief is claimed	£ .
12	Non-deductible loan interest from investments into property partnerships not included in box 5	£ .

Married Couple's Allowance

If you, or your spouse or civil partner were born before 6 April 1935, please read the notes and then complete the relevant boxes. If you're 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're 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 to help you fill in boxes 6 to 11.

If you cannot use all of your Married Couple's Allowance or you want your spouse or civil partner to have your surplus allowance, please read the notes and then put 'X' in box 10 or box 11.

1 Your spouse's or civil partner's full name 	6 If you've already agreed that half of the minimum allowance is to be given to you, put 'X' in the box
2 Their date of birth if older than you (and at least one of you was born before 6 April 1935) DD MM YYYY 	7 If you've already agreed that all of the minimum allowance is to be given to you, put 'X' in the box
3 If you've already agreed that half the minimum allowance is to go to your spouse or civil partner, put 'X' in the box 	8 Your spouse's or civil partner's full name
4 If you've already agreed that all of the minimum allowance is to go to your spouse or civil partner, put 'X' in the box 	9 If you were married or formed a civil partnership after 5 April 2019, enter the date of marriage or civil partnership DD MM YYYY
5 If, in the year to 5 April 2020, you lived with any previous spouse or civil partner, enter their date of birth 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 and limit on Income Tax relief

Other income losses	4 Enter the amount of relief shown in box 3 which is not subject to the limit on Income Tax reliefs £ . 0 0
1 Earlier years' losses – which can be set against certain other income in 2019–20 £ . 0 0	5 Tax year for which you're claiming relief in box 3, for example, 2018–19 YYYY YY –
2 Total unused losses carried forward £ . 0 0	Limit on Income Tax relief
Trade losses from a later year	6 Amount of payroll giving £ . 0 0
3 Relief now for 2020–21 trade losses or certain capital losses – read the notes £ . 0 0	

Pension Savings Tax Charges

7 Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum £ .	12 Pension scheme tax reference number PSTR
8 Value of pension benefits in excess of your Available Lifetime Allowance, not taken as a lump sum £ .	13 Amount of unauthorised payment from a pension scheme, not subject to surcharge £ .
9 Lifetime Allowance tax paid by your pension scheme £ .	14 Amount of unauthorised payment from a pension scheme, subject to surcharge £ .
10 Amount saved towards your pension, in the period covered by this tax return, in excess of the Annual Allowance £ .	15 Foreign tax paid on an unauthorised payment (in £ sterling) £ .
11 Annual Allowance tax paid or payable by your pension scheme £ .	16 Taxable short service refund of contributions (overseas pension schemes only) £ . Box 17 is not in use
11.1 Value of pension benefits transferred subject to the overseas transfer charge £ .	18 Foreign tax paid (in £ sterling) on box 16 £ .
11.2 Tax paid by your pension scheme on your overseas transfer charge £ .	

Tax avoidance schemes

19 The scheme reference number or promoter reference number	20 The tax year in which the expected advantage arises, for example, 2018–19 YYYY YY — — —
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Disguised remuneration

Only complete this section if HMRC has agreed to postpone a loan charge to the 2019–20 tax year. Read the notes before completing this section.

Non-PAYE employment income 21 Amount of non-PAYE disguised remuneration employment income £ .	Self-employed and partnership income where trading has ceased 22 Amount of disguised remuneration taxable as income in 2019–20 £ . 23 Amount of disguised remuneration to be treated as income of an earlier year £ . 24 Tax year income in box 23 is to be taxed, for example 2017–18 YYYY YY —
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