



Filling in this form

Fill in this form if you had surplus tax allowance in 2015 to 2016, and you want to transfer these to your spouse or civil partner, even if they have already had some of your allowance in their PAYE code. This will help us to check that the right amount is, or has been, given.

Important: If your spouse or civil partner is working or receiving a pension, and either of you were 65 or over on 5 April 2000, we will continue to give your spouse or civil partner transferred allowances in their PAYE code for 2016 to 2017.

If you do not want your spouse or civil partner to continue having the allowances because, for example, your circumstances have changed, put an 'X' in this box []

Personal details

Your full name

[]

Your address

[]
[]
[]
Postcode

Your daytime phone number

[]

Your email address (if you have one)

[]

Your spouse's or civil partner's full name

[]

Your spouse's or civil partner's address (if different to yours)

[]
[]
[]
Postcode

Your date of marriage or civil partnership DD MM YYYY

[] [] [] [] [] [] [] []

Your spouse's or civil partner's HM Revenue and Customs reference - this can be found on any letter or form they have received from their HMRC office

[]

Your spouse's or civil partner's National Insurance number - this may be shown on a letter from the Department for Work and Pensions

[] [] [] [] [] [] [] [] [] []

Statement of income and deductions for the year ended 5 April 2016

Your wages or salary from employment

£ []

Your casual earnings

£ []

Name and address of your employer - if more than 1, enter the last

[]
[]
[]
Postcode

Income from self-employment

£ []

State pensions, benefits and allowances - for example, State Pension, Jobseeker's Allowance, Taxable Incapacity Benefit, Employment and Support Allowance

£ []

Type of pension, benefit or allowance

[]

Other pensions

£ []

Name and address of payer

Postcode

Interest from NS&I products (without tax taken off)

£	
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Other interest (without tax taken off)

£	
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Other interest (where tax has been taken off)

£	
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Tax taken off or tax credit

£		.	
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Amount received after tax

£		.	
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Dividends from shares in UK companies and income from unit trusts

£	
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Tax deducted or tax credit

£		.	
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Amount received after tax

£		.	
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Income from furnished rooms or letting property

£	
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Any other taxable income

£	
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Description

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Deductions claimed for year to 5 April 2016 (other than personal allowances)

£		£	
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Description(s)

Claim for allowances

Tick the box(es) for the allowances you wish to claim for the year ended 5 April 2016

Married Couple's Allowance - you can only claim if you are living with your spouse or civil partner **and** either of you were born before 6 April 1935.

Blind Person's Allowance - for details about this allowance, please see page 1 of the enclosed notes.

You can claim a higher amount of Personal Allowance if you were born before 6 April 1948. Similarly, your spouse or civil partner will be able to claim an increased Personal Allowance if they were born before this date.

To claim higher amounts please enter your dates of birth below.

Your date of birth DD MM YYYY

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Your spouse's or civil partner's date of birth DD MM YYYY

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Declaration

I have claimed allowances, and I agree to transfer to my spouse/civil partner any surplus of the allowance(s) I have ticked below.

Surplus Married Couple's Allowance

Surplus Blind Person's Allowance (if due)

The information I have given on this form is correct and complete to the best of my knowledge and belief.

Signature

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Date DD MM YYYY

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Please send your completed form to:
HM Revenue and Customs
Pay As You Earn Self Assessment
BX9 1AS