



# Income Tax Relief Questionnaire

Please read the attached notes below before replying

## INCOME TAX (LIFE ASSURANCE PREMIUM RELIEF) REGULATIONS 1978

Policy number: \_\_\_\_\_ Occupation : \_\_\_\_\_

Date you left the United Kingdom : \_\_\_\_\_

Total premium before Tax Relief : £ \_\_\_\_\_

### ADDRESS HISTORY

Country of residence	From	To	Property status i.e. main residence, second home, rented, homeowner

**I hereby declare** that to the best of my knowledge and belief: (please put a 'X' in the appropriate box).

1. I/My spouse is the life assured on the policy
2. I/My spouse will be paying the premiums on the policy
3. The payer of the premiums will be resident in the UK when the premiums are paid
4. The payer of the premiums is a member of the Armed Forces/Women's Services or the wife of a member

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_

State the relationship to the Life Assured if signed by other than the Life Assured.

### Notes attaching to and forming part of the Income Tax Relief Questionnaire

- A. "Spouse" means an individual's wife or husband and includes any person who was that individual's wife or husband at the time the policy was commenced, unless the marriage was dissolved before 6 April 1979.
- B. An individual can be regarded as resident in the United Kingdom if his/her "home" is here and who if he/she goes abroad on business or pleasure goes for short periods only. For taxation purposes the United Kingdom comprises England, Scotland, Wales and Northern Ireland only, and does not include the Channel Islands, or Isle of Man.
- C. A member of the Women's Services means a women serving in any of the following capacities:-
  - I. Member of the Queen Alexandra's Royal Naval Nursing Service or any reserve thereof.
  - II. Member of the Women's Royal Naval Service or any reserve thereof.
  - III. Woman medical or dental practitioner serving in the Royal Navy or naval reserve.
  - IV. Member of the Queen Alexandra's Royal Army Nursing Corps.
  - V. Member of the Women's Royal Army Corps.
  - VI. Woman employed with the Royal Army Medical Corps. or the Royal Army Dental Corps. with the relative rank as an officer.
  - VII. Member of the Princess Mary's Royal Air Force Nursing Service and Reserve.
  - VIII. Member of the Woman's Royal Air Force.
  - IX. Woman Officer of the Medical and Dental Branch of the Royal Air Force.
  - X. Member of the Voluntary Air Detachment Reserves employed under the Admiralty Board of the Defence Council.

False statements can result in prosecution.