



**MINISTRY OF FINANCE  
INCOME TAX OFFICE**

**APPLICATION FOR £4,000 TAX CREDIT FOR PERSONS OVER 60YRS**

Name: .....

Address: .....

Taxpayer Ref. Number: ..... Date of Birth: .....

Email Address:.....

Telephone / Mobile Number:.....

Please answer the following questions by placing a tick in the appropriate box:

- |   | <b>YES</b>               | <b>NO</b>                |
|---|--------------------------|--------------------------|
| 1. Are you currently in receipt of an occupational pension/annuity?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Will you be receiving an occupational pension/annuity in the Future?<br><small>If 'Yes' a pension forecast must be provided. You can obtain this from your pension provider.</small> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Have you ever contributed towards any pension plan or scheme?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Has any employer (past or present) contributed towards any Pension plan or scheme on your behalf?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Have you ever received or will receive a lump sum in lieu Of a pension/annuity?<br><small>If 'Yes' Proof of the lump sum payment must be provided.</small>                           | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. If you have answered yes to any of the above questions, please provide fullest details:<br>.....<br>.....<br>.....<br>.....  |                          |                          |

I declare that to the best of my knowledge and belief the particulars given on this Form are correct and confirm that I will be personally liable to repay any Income Tax due as a result of incorrect information supplied by me.

Signature: .....

Date .....

For Office Use Only