

# Income Tax Office

## PENSION INCOME

### APPLICATION FOR RELIEF FROM JERSEY INCOME TAX

This form is for use by individuals who are residents of a country with which Jersey has either Double Tax Agreement or a Tax Information Exchange Agreement, which provides for relief from Jersey income tax on pension income arising in Jersey.

Use the attached notes to help you complete this form. Once you have completed the form it should first be sent to the tax authority in your country of residence for your residency to be confirmed. Once the section below has been completed and stamped by the relevant taxation authority, the form should be submitted to the Jersey Income Tax Office at the address shown at the foot of this form.

#### 1. PERSONAL DETAILS

Surname	
Forenames	
Title e.g. Mr Mrs Miss Ms etc:	
Full residential address and telephone number	
Date of Birth	
Jersey Social Security number/ National Insurance number	
Jersey Income Tax reference number	
Your Nationality	
Tax Reference Number in your country of residence	

#### 2. FOR USE BY THE TAXATION AUTHORITIES IN YOUR COUNTRY OF RESIDENCE

Please complete this section and stamp to authorise. You may keep a copy of this form for your own records. I will inform the individual making the claim if their claim is successful.

I certify that the above-named individual is / was resident in ..... within the meaning of the Tax Information Exchange Agreement between the Island of Jersey and this country and they are subject to this country's tax on the income detailed on this form.

Signature: .....

Name and position: .....

Date: .....

Official Stamp

**PLEASE COMPLETE ALL OF THE FOLLOWING QUESTIONS:**

**3. PERSONAL CIRCUMSTANCES – (use a separate signed and dated sheet if there is insufficient space below)**

1. In which country are you resident for tax purposes? .....
2. Please state the date you became resident in 1. above .....
3. Have you ever lived in Jersey? Yes  No
4. How many days have you spent in Jersey in the last three years? .....
5. Are you engaged in any trade or business in Jersey? Yes  No   
If yes, please provide details .....
6. Do you have any income arising in Jersey in addition to the pensions listed below? Yes  No   
If yes, please provide details .....
7. Are you liable to tax on the source(s) of income that you have identified on this form in your country of residence? Yes  No   
If no, please advise why .....

**4. CLAIM FOR PENSION TO BE PAID GROSS**

If you would like your pension to be paid to you without the deduction of Jersey Income tax, please enter the full details of each pension below.

Name of Pension Scheme	Name and Address of Payer	Date Payments Started

**5. CLAIM FOR REPAYMENT OF TAX DEDUCTED FROM PAYMENTS ALREADY RECEIVED**

If you have already received a pension in this tax year with Jersey income tax deducted and wish to claim a refund, please enter the full details below and *provide me with evidence of the Jersey income tax deducted.*

Name of Pension Scheme	Name and Address of Payer	Gross Amount Received	Jersey Income tax deducted in the year

**6. DECLARATION**

- I declare that I am entitled to receive the pension income detailed on this form and meet the conditions for relief in the Tax Information Exchange Agreement between the Island of Jersey and my country of residence
- The information I have given in this application is correct and complete to the best of my knowledge
- I will inform the Jersey Income Tax Office should my country of residence change in the future

Signature: .....

Date: .....