Revenue Jersey is registered as 'Controller' under the Data Protection (Jersey) Law 2018 as we collect and process personal information about you. For more information about how we use your data please go to our privacy statement on gov.je or request a written copy by phoning +44 (0) 1534440300.

This is a legal declaration, complete it carefully and accurately.

- The Department is registered as a 'Controller' under the Data Protection (Jersey) Law 2018 as we collect and process personal information about you. We process and hold your information in order to provide public services and meet our statutory obligations. View our full privacy notice at www.gov.je
- This Income Tax Return is provided for the use of a Trustee or Executor in making a statement of the income of a Trust or an Estate.
- Please return your completed form to: Revenue Jersey, P.O. Box 56, St Helier, Jersey, JE4 8PF.
- Notes to help you complete this return can be found at www.gov.je
- Complete sections 1 to 7 if you are making a declaration as a trustee. Complete sections 2 to 7 if you are making a declaration as an executor.
- Please write in block capital letters inside the boxes. Enter your figures in pounds only.
- If you need more room in any section enter a total figure and enclose a separate sheet with the details.



## Section 1: Nature of trust

## Mark the relevant box

Interest in possession trust:
Discretionary / accumulation trust
Other:

If other, state the nature of the trust:

Income from which Jersey tax is not deducted
Section 2.1: Investment income: Arising in Jersey


## 2.2: Investment income: Arising overseas



## Section 2.3: Other income: Arising in Jersey or overseas

Investment income source

## Section 3: Income from which Jersey tax is deducted at source

Name of Payer

## Section 4: Distribution from Jersey companies

If the trust received more than 4 distributions in the year, please provide the relevant information on a supplementary sheet. This can be downloaded from our website, www.gov.je/taxesmoney

Tax deducted from distribution

Credit for tax not paid by deduction

## Section 5: Names and addresses of each beneficiary

List all beneficiaries in the spaces provided

Name

## Section 6: Termination of trust or administration of estate

## Section 7: Other information

You may use this section to give additional information in support of your Return.

## Section 8: Penalties and fines

A penalty will be imposed if the Trustee or Executor fails to submit a fully completed return. Article 17A of the Income Tax (Jersey) Law 1961 allows that the last possible filing date for such a return is the 31 July following the year of assessment.
If your return is late you will be charged a $£ 300$ penalty. If your return is more than three (3) months late you will also receive monthly penalties of up to a maximum of $£ 450$.

If your address is wrong, update it here:

## Section 9: Declaration

To the best of my knowledge and belief, the particulars given on this Income Tax Return are true, complete and correct.
Signature (Please write within the box)

