HM Revenue & Customs

Enterprise Investment Scheme Claim form

Enter your Unique Taxpayer Reference (UTR) here if you have one. Otherwise, leave blank.

Take this and other info from the information given on page 1 of the certificate.

Investor tax reference

Number of shares

National Insurance number

Type of shares

The claim(s) below relate to a subscription of

£

Date issued DD MM YYYY

For shares in (company)

Unique investment reference (UIR) number

Claim to EIS Income Tax relief

Please read the notes on page 2 before deciding whether to complete this part of the form.

The amount on which I am claiming relief is

£

If you go the PAYE option, fill in these top two boxes

for the year ended 5 April

being the year in which the shares were issued.

I wish relief to be allowed in my PAYE coding.

Select this box for your PAYE tax code to be adjusted to build in your tax relief.

I am claiming relief for a year for which I have already sent in a tax return.

Select this box for a one-off tax rebate against last year's tax bill.

The amount on which I am claiming relief is

£

If you go for the one-off rebate, fill in these bottom two boxes

for the year ended 5 April

being the previous year – see page 2.

Claim to EIS deferral relief

Don't fill this in as this is a different relief.

Asset disposed of

Asset disposed of

Asset disposed of

Date of acquisition DD MM YYYY

Date of acquisition DD MM YYYY

Date of acquisition DD MM YYYY

Date of disposal

Date of disposal

Date of disposal

Chargeable gains before losses

£

Chargeable gains before losses

£

Chargeable gains before losses

£

Gain to be deferred

£

Gain to be deferred

£

Gain to be deferred

£

Enterprise Investment Scheme Claim form

Declaration

I hold a EIS certificate for the shares which were authorised by HMRC. I claim relief as shown on page 3.

The details given in this claim are correct to the best of my knowledge and belief.

Name (use capital letters)

Signature

Full address (use capital letters)

Address

Date DD MM YYYY

Postcode