

## **THE APPENDIX**

Calculation for the period from 6 April 2008 to the date of death (20.09.2008)

<u>Income</u>	<u>Payable Gross</u>	<u>Tax Credit or Deducted</u>
<b>Pension Provider</b>	£444.56	£88.91
Abbey Life	£2,302.50	£460.40
National Provident Life 000001/430976/824111/1	£1,809.90	£361.80
Norwich Union Life & Pensions F22062983	£239.00	£47.80
Norwich Union Life & Pensions C98621	£343.75	£68.75
Scottish Widows plc 462430	£232.14	£46.40
Zurich Assurance Ltd 01219-093-AK	£141.99	
Zurich Assurance Ltd 01220-093-AK	£360.69	
Zurich Assurance Ltd 9809 00747834 0	£232.14	
Windsor Life 01219-093-AK	£141.99	
Windsor Life 01220-093-AK	£360.69	
Windsor Life 9809 00747834 0	£6,609.35	£1,074.06
<b>Sub Total</b>	£2,994.00	
State	£9,603.35	£1,074.06
<b>Total</b>		
Bank/Building Society Interest (Gross)	£3,471.00	£695.00
UK Dividends & Tax Credits (Gross)	£2,489.00	£248.96
<b>Grand Total</b>	<u>£15,563.35</u>	<u>£2,018.02</u>
<u>Deduct allowances due</u>		
Personal Allowance	£9,180.00	
<b>Taxable Income</b>	<u>£6,383.35</u>	
<b>Tax Chargeable</b>		
Inv. Starting Rate 10% on	£1,896.65	£189.67
Basic Rate 20% on	£423.35	£84.67
Savings Rate 20% on	£1,574.35	£314.87
Dividend Rate 10% on	£2,489.00	£248.90
	<u>£6,383.35</u>	<u>£838.10</u>
Less tax adjustments including allowances in terms of tax		
Married Allowance 6625 x 10%		£662.50
<b>Total Tax Due</b>		<u>£175.60</u>

Pension Provider	Date Payable	Gross Amount Payable	Total
Abbey Life	27/04/2008	£88.92	
	27/05/2008	£88.91	
	27/06/2008	£88.91	
	27/07/2008	£88.91	
	27/08/2008	£88.91	£444.56
National Provident Life 000001/430976/824111/1	25/04/2008	£460.50	
	25/05/2008	£460.50	
	25/06/2008	£460.50	
	25/07/2008	£460.50	
	25/08/2008	£460.50	£2,302.50
Norwich Union Life & Pensions F22062983	06/04/2008	£301.65	
	06/05/2008	£301.65	
	06/06/2008	£301.65	
	06/07/2008	£301.65	
	06/08/2008	£301.65	
	06/09/2008	£301.65	£1,809.90
Norwich Union Life & Pensions C98621	26/04/2008	£47.80	
	26/05/2008	£47.80	
	26/06/2008	£47.80	
	26/07/2008	£47.80	
	26/08/2008	£47.80	£239.00
Scottish Widows plc 462430	30/04/2008	£68.75	
	30/05/2008	£68.75	
	30/06/2008	£68.75	
	30/07/2008	£68.75	
	30/08/2008	£68.75	£343.75
Zurich Assurance Ltd 01219-093-AK	30/05/2008	£232.14	£232.14
Zurich Assurance Ltd 01220-093-AK	30/05/2008	£141.99	£141.99
Zurich Assurance Ltd 9809 00747834 0	15/04/2008	£120.23	
	15/05/2008	£120.23	
	15/06/2008	£120.23	£360.69
Windsor Life 01219-093-AK	31/08/2008	£232.14	£232.14
Windsor Life 01220-093-AK	31/08/2008	£141.99	£141.99
Windsor Life 9809 00747834 0	15/07/2008	£120.23	
	15/08/2008	£120.23	
	15/09/2008	£120.23	£360.69
<b>Total</b>			<b>£6,609.35</b>

Deposit taker	Account Ref	Gross	Tax	Net
Cheltenham & Gloucester Fixed Rate 1YR	20272968	£418.04	£83.61	£334.43
Halifax	D/93922159-2	£2,767.50	£553.50	£2,214.00
HSBC Bank plc	41092871	£261.75	£52.35	£209.40
National Westminster Bank plc	05306280	£4.56	£0.91	£3.65
National Westminster Bank plc	05589207	£19.70	£3.94	£15.76
		<b>£3,471.55</b>	<b>£694.31</b>	<b>£2,777.24</b>

Company	Payment Date	Amount Payable	Tax Credit	Gross
Lloyds TSB Group	07/05/08	£353.21	£39.24	£392.45
BRADFORD & BINGLEY PLC	02/05/08	£35.75	£3.97	£39.72
ALLIANCE & LEICESTER PLC	19/05/08	£94.90	£10.55	£105.45
HBOS PLC	12/05/08	£370.16	£41.13	£411.29
Aviva plc	16/05/08	£77.44	£8.61	£86.05
BG Group plc	23/05/08	£63.19	£7.03	£70.22
Schroder Global Emerging Markets	31/05/08	£10.41	£1.16	£11.57
Centrica plc	11/06/08	£109.43	£12.16	£121.59
Internatnl Power	26/06/08	£47.74	£5.30	£53.04
BRITISH ENERGY GRP	31/07/08	£1.08	£0.12	£1.20
United Utilities	08/08/08	£782.98	£86.99	£869.97
NATIONAL GRID PLC	20/08/08	£76.68	£8.52	£85.20
BG Group plc	12/09/08	£51.34	£5.70	£57.04
BT Group plc	15/09/08	£166.40	£18.48	£184.88
		<b>£2,240.71</b>	<b>£248.96</b>	<b>£2,489.67</b>



**Name:** MR J A TAYLOR Deceased  
**NI No:** ZE220529A  
**Ref:** 205/RAC203

Calculation for the period from 6 April 2008 to the date of death

<u>Description of Income</u>	<u>Income</u>	<u>Tax Credit</u>
Total pensions	£ 8,200	£ 1,313.80
State pension	£ 2,984	
Bank/Building Society Interest (Gross)	£ 3,447 ✓	£ 689.41
Dividends & Tax Credits (Gross)	£ 2,489 ✓	£ 248.98
<b>Total amount of income &amp; income tax/tax credit</b>	<b>£ 17,130</b>	<b>£ 2,252.17</b>
<u>Deduct Allowances due</u>		
Personal Allowance	9180	
<b>Total Allowances</b>	<b>9180</b>	<b>£ 9,180</b>
<b>Taxable Income</b>	<b>£ 7,950</b>	
<b>Tax Chargeable</b>		<b>£ 30.80</b>
Inv. Starting Rate	10 % on £ 308	£ 402.80
Basic Rate	20 % on £ 2,014	£ 628.20
Savings Rate	20 % on £ 3,141	£ 248.90
Dividend Rate	10 % on £ 2,489	£ -
	£ -	£ -
	£ -	£ -
	<b>£ 7,950</b>	<b>£ 1,310.50</b>
<b>Less tax adjustments including allowances in terms of tax</b>		
Married Allowance	6625 10% £ 662.50	£ 662.50
<b>Total tax due</b>	<b>£ 662.50</b>	<b>£ 648.00</b>
<b>Repayment of tax and/or payment of tax credit due for year</b>		<b>£1,604.17</b>
		£ -
		£ -
		£ -
<b>Add</b>		<b>£ 2.21</b>
Repayment Supplement		£ 2.21
<b>Tax repayable and/or tax credit payable</b>		<b>£1,606.38</b>



**Name:** MR J A TAYLOR Deceased  
**NI No:** ZE220629A  
**Ref:** 206/RAC203

**Calculation for the period from 6 April 2008 to the date of death**

<u>Description of income</u>	<u>Income</u>	<u>Tax Credit</u>
Total pensions	£ 7,577	£ 1,287.40
State pension	£ 2,994	
Bank/Building Society Interest (Gross)	£ 3,447	£ 689.41
Dividends & Tax Credits (Gross)	£ 2,489	£ 248.98
<b>Total amount of income &amp; income tax/tax credit</b>	<b>£ 16,507</b>	<b>£ 2,205.77</b>
<u>Deduct Allowances due</u>		
Personal Allowance	9180	
<b>Total Allowances</b>	<b>9180</b>	
<b>Taxable income</b>	<b>£ 7,327</b>	
<b>Tax Chargeable</b>		
Inv. Starting Rate	10 % on £ 929	£ 92.90
Basic Rate	20 % on £ 1,391	£ 278.20
Savings Rate	20 % on £ 2,518	£ 503.60
Dividend Rate	10 % on £ 2,489	£ 248.90
	£ -	£ -
	£ -	£ -
	<b>£ 7,327</b>	<b>£ 1,123.60</b>
<b>Less tax adjustments including allowances in terms of tax</b>		
Married Allowance	6625 10% £ 662.50	£ 662.50
<b>Total tax due</b>	<b>£ 662.50</b>	<b>£ 461.10</b>
<b>Repayment of tax and/or payment of tax credit due for year</b>		<b>£1,744.67</b>
<b>Less Payment already made</b>		£ 1,604.17
<b>Add</b>		£ -
Repayment Supplement		£ 1.01
<b>Tax repayable and/or tax credit payable</b>		<b>£141.51</b>



PID : 3459039

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**Name:** MR J A TAYLOR Deceased  
**NI No:** ZE220529A  
**Ref:** 206/RAC203

**Calculation for the period from 6 April 2008 to the date of death**

<u>Description of Income</u>	<u>Income</u>	<u>Tax Credit</u>
Total pensions	£ 6,609	£ 1,073.80
State pension	£ 2,994	
Bank/Building Society Interest (Gross)	£ 3,447	£ 689.41
Dividends & Tax Credits (Gross)	£ 2,489	£ 248.96
<b>Total amount of income &amp; income tax/tax credit</b>	<b>£ 16,539</b>	<b>£ 2,012.17</b>
<u>Deduct Allowances due</u>		
Personal Allowance	9180	
<b>Total Allowances</b>	<b>9180</b>	
<b>Taxable Income</b>	<b>£ 9,180</b>	
<b>Tax Chargeable</b>		
Inv. Starting Rate      10 % on      £ 1,897	£ 189.70	
Basic Rate                20 % on      £ 423	£ 84.60	
Savings Rate             20 % on      £ 1,550	£ 310.00	
Dividend Rate            10 % on      £ 2,489	£ 248.90	
	£ -	
	£ -	
	<b>£ 6,359</b>	
<b>Less tax adjustments including allowances in terms of tax</b>		
Married Allowance      6625      10%      £ 662.50	£ 662.50	
<b>Total tax due</b>	<b>£ 662.50</b>	<b>£ 170.70</b>
<b>Repayment of tax and/or payment of tax credit due for year</b>		<b>£1,841.47</b>
Less Non Repayable tax		£ 78.26
Less Payment already made		£ 1,744.67
		£ -
<b>Add</b>		£ -
Repayment Supplement		£ 0.20
<b>Tax repayable and/or tax credit payable</b>		<b>£18.74</b>