



# My Virtual Financial Controller

Financial Wizardry for the Self Employed

## Tax return guide

### 4. Interest, dividends and charitable donations

"On a mission to help women in business"

Accounting, tax & bookkeeping services  
for women in business & microbusiness

# Tax return guide

## 4. Interest, dividends and charitable donations

### Interest

If you received UK interest then complete this section. You should have a statement from the interest payer which gives you the information needed. If the interest was taxed then put in what you actually RECEIVED.

HMRC: Fill in your return - ... x +

HM Revenue & Customs (GB) | <https://online.hmrc.gov.uk/self-assessment-file/> | Google

Self Assessment | Your tax return is 47% complete

### 4. Fill in your return

#### UK interest

You have said that you received UK interest in the tax year 2013-14. Please complete the following questions.

The answer to these questions can be found in your statement from the interest payer.

The [Taxed UK interest worksheet](#) will calculate the amount of interest and will be helpful if you have more than one account.

Taxed UK interest etc. Enter net amount **after** tax has been taken off: £

The [Untaxed UK interest worksheet](#) will calculate the amount of untaxed interest and will be helpful if you have more than one account.

Untaxed UK interest etc (amounts which have **not been taxed**). Enter total amount: £

[Delete UK interest section](#)

The 'Next' button will automatically save your data, or you can click 'Save' at any time.

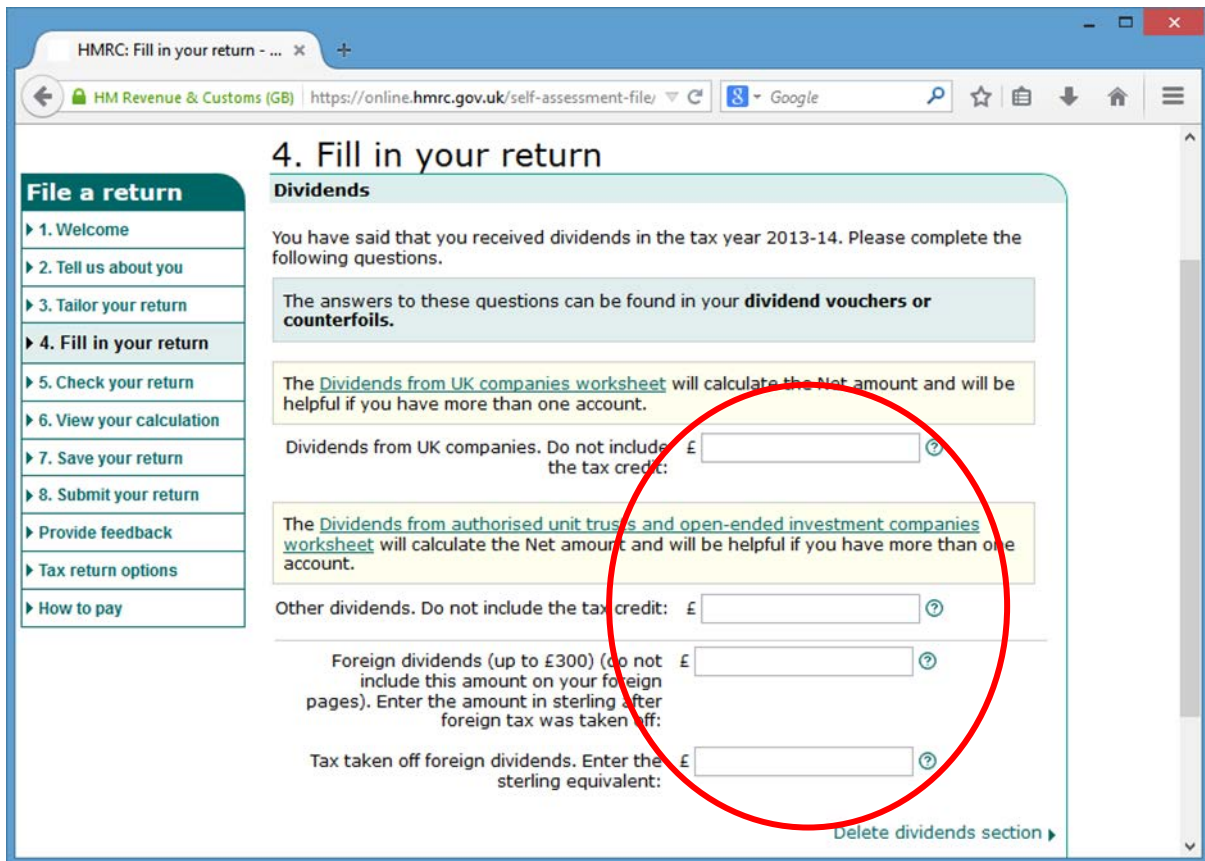
'Next' will take you to the next section of your Tax Return

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## Dividends

If you received dividends from UK companies then complete this section. Again put in what you RECEIVED. Keep your dividend vouchers – you will need these to support your tax return if it is ever investigated.

You can also provide information here on foreign dividends up to £300. If your foreign dividends were more than £300 then you will need to complete the foreign pages instead.



The screenshot shows the HMRC online tax return form for the year 2013-14, specifically the 'Dividends' section. The browser address bar shows 'https://online.hmrc.gov.uk/self-assessment-file/'. The page title is '4. Fill in your return' and the sub-section is 'Dividends'. A red circle highlights the input fields for 'Dividends from UK companies', 'Other dividends', 'Foreign dividends (up to £300)', and 'Tax taken off foreign dividends'. The form includes instructions and links to worksheets for calculating the net amount.

**4. Fill in your return**

**Dividends**

You have said that you received dividends in the tax year 2013-14. Please complete the following questions.

The answers to these questions can be found in your **dividend vouchers or counterfoils**.

The [Dividends from UK companies worksheet](#) will calculate the Net amount and will be helpful if you have more than one account.

Dividends from UK companies. Do not include the tax credit: £

The [Dividends from authorised unit trusts and open-ended investment companies worksheet](#) will calculate the Net amount and will be helpful if you have more than one account.

Other dividends. Do not include the tax credit: £

Foreign dividends (up to £300) (do not include this amount on your foreign pages). Enter the amount in sterling after foreign tax was taken off: £

Tax taken off foreign dividends. Enter the sterling equivalent: £

[Delete dividends section](#)

## Charitable donations

Complete this section if you made any gift aid charitable donations in the year. Split them between one-off payments and regular donations.

HMRC: Fill in your return - ... x +

HM Revenue & Customs (GB) | <https://online.hmrc.gov.uk/self-assessment-file/> | Google

### 4. Fill in your return

#### Charitable giving

You have said that you gave to charity in the tax year 2013-14. Please complete the following questions.

The answers to these questions can be found in your **payslip** or **charity certificate**.

The [Gift aid worksheet](#) will be helpful if you make more than one payment (up to a maximum of 10).

Gift Aid payments made in the year to 5 April 2014: £ 800.00 ?

Total of any 'one-off' payments from above: £ 200.00 ?

Gift Aid payments to non-UK charities in the first box above: £ ? ?

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Gift Aid payments made **in the year** to 5 April 2014 but treated as if made in the year to 5 April **2013**: £ ? ?

Gift Aid payments made **after** 5 April 2014 but to be treated as if made in the year to 5 April **2014**: £ ? ?

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Value of qualifying shares or securities gifted to charity: £ ? ?