

Monday - Friday	☎	0203 1375773
9am - 6pm	✉	info@taxrefundpro.co.uk
Free, no obligation advice	📄	www.taxrefundpro.co.uk

MILEAGE TAX REBATE CLAIM PACK

Maximise your refund with TaxRefundPro!

ACT FAST!

You need to claim ASAP. If you leave it too late you may miss out hundreds of pounds in lost refunds by missing deadlines from HMRC.

REFUNDING ALL YOUR MONEY

As fully registered tax agents we understand exactly what you can claim for, ensuring that **you get the highest amount of money back in your pocket.**

KEEPING IT SIMPLE

Our paperwork just takes a few minutes to complete. All you need to do is **fill in a few basic details, sign** where indicated and **complete the included mileage log to the best of your ability.**

PAID DIRECTLY INTO YOUR BANK

We pay **directly into the nominated bank account of your choice**, ensuring you get your refund as soon as possible. *You can tell us your bank details either now or at a later stage, if you prefer.*

WHAT WE NEED FROM YOU

Fill in

- Fill in your personal details, including your National Insurance number.
- Fill in the employment history, including any period when claiming Jobseeker/Employment Allowance.
- Complete the mileage log *as best you can* – **You don't need to provide any receipts!**

Sign

- Sign *all* the forms as indicated, so we can get all the information needed to calculate your claim and work on your behalf.
- Make sure your employer or Payroll department completes and signs the relevant forms.

Send

- Include any **P45, P60 and P11d** documents from the **last 4 tax years**. Don't worry if you don't have all of them.
- Use the **freepost** envelope to return all the paperwork, no postage is required.

WHAT HAPPENS NEXT

Submit to
HMRC

We make all calculations & submit your claim to HMRC

Chase progress

We keep chasing HMRC until your money is refunded

We pay you

We pay you directly into your nominated bank account



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Please check and complete all sections thoroughly.

Personal Details			
Full Name		Date of birth	
Mobile		NI Number	
Home/Work		Nationality	
Email		Gender	

Current Address	
Postcode	

Previous Address	
Postcode	

Previous Tax Rebates	
How much tax rebate have you received in the last 4 years, enter 0 if none.	
2012/13 - £	2014/15 - £
2013/14 - £	2015/16 - £
This information is important	

Employee Benefits	
Have you received any additional benefits from your employer?	
Company Car	Medical Insurance
Dental Insurance	Fuel Card
Other (please specify):	

Entering / Leaving the UK	
Are you a current UK Resident? Yes / No	
Date of arrival in the UK:	
Already left or leaving the UK? Yes / No	
Date exiting the UK:	

Additional Information	
UTR Number:	
Additional Notes:	

Bank details for us to pay your refund – <i>Optional, you can communicate these to us at a later stage, if you prefer.</i>	
Bank name:	
Sort Code:	
Account Number:	
Name of account holder:	
International Bank Accounts ONLY (Non UK) – <i>Optional, you can communicate these to us at a later stage.</i>	
BIC/Swift code*:	
IBAN number*:	
Reference(if required):	

COMPLETED CLAIM PACK CHECK LIST

Incomplete information may delay your claim. Please be as accurate as possible.

Is your personal information complete & accurate? Did you include your National Insurance number?

Tell us about any previous tax rebates you may have received in the last 4 years. This could affect your claim.

Is your employment history accurate? This info will allow us to check HMRC's records about you are correct.

Have you completed the Mileage log as required? We will base our calculations on the info you provided.

Have you signed & dated all the forms where indicated? Has your employer signed the Mileage log and completed the Payroll department form?

Have you included all relevant P60, P45 and P11d documents?



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To ensure we can get a maximum refund value back to you, please tell us your employment history for the last 4 years, including any unemployment benefit may have received. It's important you give us all the information as HMRC may owe you more than you think. Continue on a blank page if necessary.

Employment History

1 Employed / Self Employed / Unemployed

(please circle to select which status applies)

Start Date:	/	/
End Date:	/	/
Name of Employer:		
Job title/Occupation:		
Employer Address:		
Postcode:		
Contact No:		

Employment History

2 Employed / Self Employed / Unemployed

(please circle to select which status applies)

Start Date:	/	/
End Date:	/	/
Name of Employer:		
Job title/Occupation:		
Employer Address:		
Postcode:		
Contact No:		

Employment History

3 Employed / Self Employed / Unemployed

(please circle to select which status applies)

Start Date:	/	/
End Date:	/	/
Name of Employer:		
Job title/Occupation:		
Employer Address:		
Postcode:		
Contact No:		

Employment History

4 Employed / Self Employed / Unemployed

(please circle to select which status applies)

Start Date:	/	/
End Date:	/	/
Name of Employer:		
Job title/Occupation:		
Employer Address:		
Postcode:		
Contact No:		

Unemployment Benefit

Benefit Office:	
Date claim started:	
Date claim ceased:	

Unemployment Benefit

Benefit Office:	
Date claim started:	
Date claim ceased:	

Full Name:

Signed:

Date:



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TaxRefundPro Ltd - Agent Contract – Mileage Expense Claim

1. I give full consent for TaxRefundPro Ltd to act on my behalf with regards to my HMRC tax refund claim.
2. I certify that all details are correct and completed in full to the best of my knowledge.
3. I understand that TaxRefundPro Ltd will charge me an administration fee of 20% of the total tax refund. This is subject to a minimum charge of £90 per claim. Once TaxRefundPro Ltd have submitted my claim to HMRC and I receive a refund, I understand that I am liable to pay the administration fee.
4. I am aware that my refund is usually paid into the TaxRefundPro Ltd account first, and once the funds are cleared that payment will be made to me. Payments are made into UK bank accounts free of charge. If I require an overseas transfer then an additional fee may apply.
5. TaxRefundPro Ltd operate a "No Refund, No Fee" policy.
6. I authorise TaxRefundPro Ltd to act on my behalf with regards to obtaining documents from previous and current employers should this be required. A fee of £20 + VAT per employer will be charged for such a service and this will not be carried out without separate prior consent.
7. I authorise TaxRefundPro Ltd to obtain from any Job Centre or office of the Department for Work and Pensions, information relating to any Employment Support Allowance or Jobseekers Allowance claimed for any or all of the last four tax years.
8. I understand that all fees are subject to VAT, if applicable to my country of residence.
9. I am aware that TaxRefundPro Ltd will hold on record all correspondence between myself, TaxRefundPro Ltd and HMRC.
10. I accept that TaxRefundPro Ltd cannot be held responsible for any claims that exceed the expected completion time if any of the following apply; I do not have a permanent National Insurance number, I provide incorrect and/or insufficient information; I provide incorrect and/or insufficient documentation; I have requested TaxRefundPro Ltd to follow up outstanding documentation on my behalf; or any unavoidable delays are caused by HMRC.
11. I understand that TaxRefundPro Ltd cannot be held responsible for any items of mail that are lost, delayed and or damaged by Royal Mail. **When sending original documents we strongly recommend that you send them as recorded delivery and keep proof of postage.**
12. I confirm that the bank details I have provided are accurate and correct and understand that TaxRefundPro Ltd reserve the right to issue me a cheque to the residential address provided should the bank transfer be unsuccessful due to incorrect information provided by me.
13. I understand that I am liable to pay any charges or costs arising from sending money to an international destination either by post, money transfer or bank credit.
14. The parties agree that any legal action or proceedings arising from or in connection with this Agreement are governed by the laws of England and submit to the exclusive jurisdiction of the English Courts.

Full Name:

Signed:

Date:

Please tick the box(es) and provide the reference(s) requested *only* for those matters for which you want HMRC to deal with your agent.

Individual*~~/Partnership~~*~~/Trust~~* Tax Affairs X * select
 *delete as appropriate (including National Insurance)

Your National Insurance number (*individuals only*)

--	--	--	--	--	--	--	--

If you are self employed tick here ☐

Unique Taxpayer Reference (*if applicable*)

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If UTR not yet issued tick here ☐

If you are a Self Assessment taxpayer, we will send your Statement of Account to you, but if you would like us to send it to your agent instead, please tick here ☐

Address
Postcode
Telephone number

Address	TaxRefundPro Ltd
	1a Northgate
	Rochester
	Kent
Postcode	ME1 1LS
Telephone number	0203 137 5773
Agent codes (SA/CT/PAYE)	1324QL
Client reference	

SA	<input type="checkbox"/>	/	/	COTAX	<input type="checkbox"/>	/	/
NIRS	<input type="checkbox"/>	/	/	EBS	<input type="checkbox"/>	/	/
COP	<input type="checkbox"/>	/	/	VAT	<input type="checkbox"/>	/	/
NTC	<input type="checkbox"/>	/	/	COP link	<input type="checkbox"/>	/	/

Details of Claimant

Full Name	
Address	
Postcode	

Claim

I would like to claim repayment of overpaid income tax for the tax years **2012/13, 2013/14, 2014/15 & 2015/16.**

/	/
---	---

Claimant's Signature: _____

Date:

/	/
---	---

Authority

I authorise **TaxRefundPro Ltd:**

**1A Northgate
Rochester
Kent
ME1 1LS**

To receive on my behalf the amount due.

Claimant's Signature: _____

Date:

/	/
---	---

5 General expense allowances received

If you received general expense allowances, rather than separate amounts for individual expenses, enter the total amounts received and the types of expenses they covered.

Type of expense covered	Amount received
	£ .
	£ .
	£ .

Please continue on a separate sheet if necessary

Total **13** £ .
Copy this figure to box 13 below

6 Total expenses and declaration

Please calculate your expenses by transferring the amounts from sections 2 to 5. Enter the total amounts in boxes 14 and 15, then fill in the declaration. If you give false information you could be prosecuted.

Vehicle expenses in your own vehicle

Total mileage allowance relief *copy 8 from page 2*

8 £ .

Hotel and meal expenses

Amount you spent on allowable items
copy 9 from page 3

9 £ .

Amount repaid to you *copy 10 from page 3*

10 £ .

Other expenses

Amount you spent on allowable items
copy 11 from page 3

11 £ .

Amount repaid to you *copy 12 from page 3*

12 £ .

General expense allowances received

copy 13 from section 5 above

13 £ .

Total expenses

boxes 8 plus 9 plus 11

14 £ .

Total of the amounts repaid to you and allowances received

boxes 10 plus 12 plus 13

15 £ .

If relief is due you will receive a repayment of the tax paid on the net allowable expenses.

The information I have given on this form is correct and complete to the best of my knowledge and belief.

Signature



Date DD MM YYYY

Before you send this form to us, we recommend that you take a copy of your completed form in case we contact you for further information.

Please return the completed form to your HM Revenue & Customs office.



TaxRefundPro
1a Northgate
Rochester
Kent
ME1 1LS

For PAYROLL DEPARTMENT to complete

DATE:

Dear Payroll Department,

We are the acting Tax Agent for the employee named below. Please see attached copy of a signed contract giving us authority to act on their behalf in order to obtain a tax refund. Our client would like to claim for PAYE expenses relating to mileage and in order to complete our client's claim could you please provide the following information:

To

Employee Full Name:

National Insurance Number:

Works/Payroll number:

With regards to this employment will you let me know if the required above named to meet any costs not reimbursed by you generally but specifically under the following headings:

1. Travel

1.1 What location do you consider to be this employee's usual place of work?

1.2 If this employee was required to travel to a series of temporary workplaces away from the vicinity of the usual place of work:

- Did you provide a vehicle for that purpose?
- Did you meet all the costs of the running that vehicle or was the employee required to meet any or part of these costs?



- Did you reimburse travel expense based on the cost of the employee using public transport or the employee's own vehicle using a mileage rate or otherwise?
- Did you meet any subsistence costs arising from the need to travel?

1.3 Do you keep, or did you require the employee to keep a record of the places the employee was required to travel to and / or the mileage to and from the locations at which the work was conducted?

2. Subsistence

2.1 Do you consider this employee was required to work at a temporary workplace for a sufficient length of time that you agreed to meet the cost of all the meals taken or would have expected the employee to meet the expense?

2.2 Did you pay any amount to cover overnight stays or meals associated with the working at a temporary workplace? Was this paid tax free or subject to tax?

3. Tools, Protective Clothing, other expenses

3.1 Do you provide all the tools and equipment necessary for the employee to fulfil the requirements of the employment? If not, what tools or equipment would you expect the employee to provide?

3.2 Do you provide all the protective clothing and equipment necessary for the employee to fulfil the requirements of the employment? If not, what protective clothing or equipment would you expect the employee to provide?

3.3 If you provide protective clothing or "log'd work-wear", do you meet any laundry costs associated with keeping these clean?

3.4 Please provide details of any other expense that you consider employees engaged on the same duties as would be required to meet in fulfilling those duties.

Employer's signature.....

Name (Printed).....

Contact telephone number.....



Mileage log

We have tried to make things as easy as possible for you. Please continue on a separate page if necessary.

Please supply the required information as any missing or unclear information may result in your claim taking longer or being disallowed by HMRC. Please bear in mind that we act on your behalf on the assumption that the information you provide is true and genuine.

Upon receipt of this mileage log, we may contact you if we require more details.

E.g.

Start Date	Finish Date	Travel From	Travel to	Reason for the trip (Please be specific, do not just write "work")	Number of days worked	Overall Mileage (Round Trip)
07/12/13	11/12/13	Liverpool, L12 8QT	Liverpool, L23 9TG	Home Caring	5	12.3 x 5 = 61.5
07/12/13	11/12/13	Liverpool, L12 8QT	Liverpool, L21 5HD	Site Visit	3	6.1 x 3 = 18.3
07/12/13	11/12/13	Liverpool, L12 8QT	Liverpool, L14 0AA	Meetings	7	1.8 x 7 = 12.6

Above is an example of a week's worth of business mileage. Remember the more information you give, the stronger your claim will be.

Print and use as many pages as necessary.

Signed by Client:.....

Date:.....

Signed by Employer:.....

Date:.....

Position:.....