

Monday - Friday	<b>①</b>	0203 137 5773
9am - 6pm	$\boxtimes$	info@taxrefundpro.co.uk
Free, no obligation advice	4	www.taxrefundpro.co.uk

## TOOL EXPENSES 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 claim pack takes just a few minutes to complete. All you need to do is **fill in a few basic details** & **sign** where indicated, making it **quick and simple as possible for you**.

#### 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.
- Provide statements from your tool rep 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 signs the Tool Expense Declaration.

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 your claim to HMRC

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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## Dlogge shock and complete all costions thereughly

Personal Details Full Name Mobile Home/Work Email  CurrentAddress  Postcode  Previous TaxRebates How much tax rebate have you received in the last 4 years, enter 0 if none. 2012/13-£ 2013/14-£ 2015/16-£ This information is important  Entering / Leaving the UK Are you a current UK Resident? Yes / No Date of arrival in the UK: Already left or leaving the UK? Already left or leaving the UK? Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer. Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BBIC/Swiftcode*: IBAN number*: Reference(if required):	Please c	neck and comple	ete ansections	s thoroughly.
Mobile Home/Work Email  Current Address  Previous Address  Previous Address  Previous Address  Previous TaxRebates How much tax rebate have you received in the last 4 years, enter 0 if none. 2012/13 · £ 2013/14 · £ 2013/14 · £ 2015/16 · £ This information is important  Entering / Leaving the UK Are you a current UK Resident? Yes / No Date of arrival in the UK: Already left or leaving the UK? Already left or leaving the UK:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer. Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BIC/Swift code*: IBAN number*:	Personal Details			
Nationality   Gender	Full Name		Date of birth	
Current Address  Postcode  Previous TaxRebates How much tax rebate have you received in the last 4 years, enter 0 if none. 2012/13 · £	Mobile		NI Number	
Previous Tax Rebates How much tax rebate have you received in the last 4 years, enter 0 if none. 2012/13 · £ 2014/15 · £ Dental Insurance This information is important  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:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage. Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BIC/Swift code*: IBAN number*:	Home/Work		Nationality	
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Previous TaxRebates How much tax rebate have you received in the last 4 years, enter 0 if none.  2012/13 · £				
Previous TaxRebates How much tax rebate have you received in the last 4 years, enter 0 if none.  2012/13 - £ 2014/15 - £ Company Car Medical Insurance  Dental Insurance Fuel Card Insurance  This information is important  Entering / Leaving the UK Are you a current UK Resident? Yes / No Date of arrival in the UK:  Already left or leaving the UK:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer.  Bank name:  Sort Code:  Account Number:  Name of account holder:  International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage.  BIC/Swift code*:  IBAN number*:	Current Address		Previous Addres	ss
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the last 4 years, enter 0 if none.  2012/13 - £  2013/14 - £  2015/16 - £  This information is important  Entering / Leaving the UK  Are you a current UK Resident? Yes / No  Date of arrival in the UK:  Already left or leaving the UK:  Already left or leaving the UK:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer.  Bank name:  Sort Code:  Account Number:  Name of account holder:  International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage.  BIC/Swiftcode*:  IBAN number*:	Previous TaxRebates		Employee Bene	fits
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Dental Insurance 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:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer.  Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BIC/Swift code*: IBAN number*:	the last 4 years, enter 0 if no	ne.	your employer?	
This information is important  Entering / Leaving the UK  Are you a current UK Resident? Yes / No Date of arrival in the UK: Already left or leaving the UK:  Already left or leaving the UK:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer.  Bank name:  Sort Code:  Account Number:  Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage.  BIC/Swiftcode*:  IBAN number*:	2012/13 - <b>£</b> 2014/	15 - <b>£</b>	Company Car	MedicalInsurance
This information is important  Cher (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:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer.  Bank name:  Sort Code:  Account Number:  Name of account holder:  International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage.  BIC/Swiftcode*:  IBAN number*:	2012/14 <b>£</b>	716 <b>£</b>	Dental	Fuel Card
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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:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer. Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BIC/Swift code*: IBAN number*:	Entering / Leaving the UK		Additional Infor	mation
Date of arrival in the UK: Already left or leaving the UK? Yes / No Date exiting the UK:  Bank details for us to pay your refund — Optional, you can communicate these to us at a later stage, if you prefer. Bank name: Sort Code: Account Number: Name of account holder: International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage. BIC/Swiftcode*: IBAN number*:		nt? Yes / No		
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International Bank Accounts ONLY (Non UK) — Optional, you can communicate these to us at a later stage.  BIC/Swift code*:  IBAN number*:				
BIC/Swift code*:  IBAN number*:				
IBAN number*:		ONLY (Non UK) – <u>Opt</u>	<u>ional</u> , you can comm	unicate these to us at a later stage.
	•			
Reference(if required):				
	Reference(if required):			

## COMPLETED CLAIM PACK CHECK LIST

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

Tell us about any previous tax complete & accurate? Did you 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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Free, no obligation advice	4	www.taxrefundpro.co.uk

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.

information as	s HMRC may	owe you m	ore than you think. Continue on a blank page if necessary.
Employment History	/		Employment History
1 Employed / Self En (please circle to select			2 Employed / Self Employed / Unemployed (please circle to select which status applies)
Start Date:	/	/	Start Date: / /
End Date:	/	/	End Date: / /
Name of Employer:			Name of Employer:
Job title/Occupation:			Job title/Occupation:
Employer Address:			Employer Address:
Postcode:			Postcode:
Contact No:			Contact No:
Employment History	/		Employment History
3 Employed / Self En (please circle to select			4 Employed / Self Employed / Unemployed (please circle to select which status applies)
Start Date:	/	1	Start Date: / /
End Date:	/	1	End Date: / /
Name of Employer:			Name of Employer:
Job title/Occupation:			Job title/Occupation:
Employer Address:			Employer Address:
Postcode:			Postcode:
Contact No:			Contact No:
Unemployment Ben			Unemployment Benefit
BenefitOffic			BenefitOffice:
Date claim starte			Date claim started:
Date claim cease	d:		Date claim ceased:
Full Name:			
Signed:			Date:



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## TaxRefundPro Ltd - Agent Contract - Tool 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 Nam	e:		
Signed:		Date:	



# **Authorising your agent**

Please read the notes on the back before completing this authority. This authority allows us to exchange and disclose information about you with your agent and to deal with them on matters within the responsibility of HM Revenue & Customs (HMRC), as specified on this form. This overrides any earlier authority given to HMRC. We will hold this authority until you tell us that the details have changed.

	your name)
of (name	e of your business, company or trust if applicable)
authoris	e HMRC to disclose information to
(agent's	business name)
TaxRef	undPro Ltd
behalf, a The auth	hat the nominated agent has agreed to act on my/ou nd the information is correct and complete. norisation is limited to the matters shown on the nd side of this form.
Signatur	e see note 1 overleaf before signing
27	
Date	
Give your	personal details or Company registered office here
Address	personal details of company registered office here
71001035	
Postcode	
Telephone	number
Give vou	agent's details here
- SEMPLIN	
D. (5-00.50.0)	TaxRefundPro Ltd
	1a Northgate
	Rochester
	Kent
enace was enaced	ME1 1LS
Postcode	100
Postcode Telephone	number 0203 137 5773
Telephone	number 0203 137 5773 es (SA/CT/PAYE) 1324QL
Telephone	0203 137 3773
Telephone	0203 137 3773 es (SA/CT/PAYE) 1324QL
Telephone	0203 137 3773 es (SA/CT/PAYE) 1324QL
Telephone Agent code Client refe	rence 1324QL
Telephone Agent code Client refe	rence 1324QL  al use only
Telephone Agent code Client refe	rence 1324QL

Please tick the box(es) and provide the reference(s)

requested <i>only</i> 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)  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					

HMRC 02/09 64-8



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:	/	1	

# 5 General expense allowances received

ype of expense covered	Amount	received
	£	(*)
	£	•
	£	•
ease continue on a separate sheet if necessary		

# 6 Total expenses and declaration

Please calculate your expenses by transferring the amo in boxes 14 and 15, then fill in the declaration. If you gi		nts
Vehicle expenses in your own vehicle		
Total mileage allowance relief copy 8 from page 2	8 £ •	
Total filleage allowance relief copy o from page 2		
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	11 £	
copy 11 from page 3	L .	
		12 6
Amount repaid to you copy 12 from page 3		12 £ •
6 !		
General expense allowances received		13 £
copy 13 from section 5 above		
Total expenses		
boxes 8 plus 9 plus 11	14 £	
and the second of the second o		
Total of the amounts repaid to you and allo	wances received	15 £ •
boxes 10 plus 12 plus 13		P
If relief is due you will receive a repayment of the tax p	aid on the net allowable expenses.	
The information I have given on this form is correct ar	nd complete to the best of my knowledge and	belief.
Signature		
Signature	<b>-</b>	
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.



Dear Sir/Madam

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## **Tools Expense Declaration - To be completed by Employer**

Employee's Na	me:				
Employee's N	number:				
Claim for hand tools					
I confirm that the above named employee is not supplied with hand tools. We provide fixed equipment but expect our employees to supply and maintain their own toolkit. These expenses are wholly and exclusively incurred by them and are necessary for them to carry out the duties of their job. We do not reimburse our employees for any of these expenses.					
Full Name:		Job title:			
Signed:		Date:			
For & On Behalf Of (company stamp or write name and address of business)					
For further clarification I can be reached on telephone number:					