

Monday - Friday	☎	0203 137 5773
9am - 6pm	✉	info@taxrefundpro.co.uk
Free, no obligation advice	🌐	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 to
HMRC

We make all calculations and 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 – 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 Name:

Signed:

Date:

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.**

/	/
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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:

/	/
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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

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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.



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Tools Expense Declaration - To be completed by Employer

Dear Sir/Madam

Employee's Name:

Employee's NI 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: _____