

Claim My Tax – Terms Of Business

➤ The Claims Services

1. Please note Claim My Tax Limited (CMT) provides tax rebate services in connection with overpayment of tax in the years stated on the claim form, overpayment of tax can arise from many factors including but not limited to; marriage allowance rebates, tax deductions on personal savings allowance and/or work-related tax rebates. The services CMT provides involves investigating and advising upon a potential tax rebate paid by to the client from Her Majesty Revenue & Customs (HMRC)
2. In very brief terms, the following are the typical steps CMT would undertake in the course of providing tax rebate services: (a) obtaining initial instructions from the client as to all relevant circumstances giving rise to the tax payment; (b) assessing the information provided and advising the client as to the possibility of claiming a tax rebate; (c) preparing the necessary documentation for a tax refund to be submitted to HMRC; (d) engaging the respondent to the point of settlement with HMRC and confirmation of tax rebate.

➤ Client's Obligations

3. CMT considers that client co-operation is paramount in the rebate process as it enhances the prospects of success. That so, the commitment CMT expects from clients is as follows: (a) providing information and instructions when requested and promptly; (b) completing paperwork; (c) co-operating with CMT at all times in the course of the claim process; and (d) not misleading CMT in any way.
4. Client identification – as with other professional services firms. We are required to identify our clients for the purposes of the UK anti-money laundering legislation. We may request from you and retain such information and documentation as we require for these purposes.

➤ How CMT Keeps its Clients Updated?

5. Throughout the rebate process, CMT provides regular updates to the client of all material developments. CMT will communicate generally with the client via telephone, post, email & SMS messages.

➤ CMT Fees

6. Once a client enters a contract with CMT pursuant to the Terms & Conditions, CMT would be entitled to charge a fee of 35% +VAT plus an additional admin fee charge of £50.

Important Note: If the redress recovered by CMT is used by the respondent towards arrears owed, the client remains liable to pay out of his/her own funds the fee chargeable by CMT. If the client requests that CMT reissue a cheque CMT have the right to charge a fee of £10 to complete the request, deducted from the payment.

➤ The Right to Cancel

7. The client can cancel her/his agreement with CMT at any time within 14 days of the client's signature being obtained by CMT without giving any reason and without incurring any liability unless the client or CMT receives any correspondence relating to the rebate amount or receives a tax rebate from HMRC within this period; in which case CMT's fee will be due. The client can communicate cancellation of the CMT agreement by any means of communication to CMT.

➤ The Right to Terminate

8. The client can terminate her/his agreement with CMT at any time after the 14 days cancellation period (as explained above). In the event the client cancels after 14 days, the client will be charged a termination fee which will be calculated at £25 per hour to a maximum of 3 hours, for work carried out with regards to the tax rebate. If this occurs, CMT's fee will be due in full if the client ultimately receives an offer of rebate or receives a rebate from HMRC.

Marriage Allowance Transfer, Deed of Assignment and Form 64-8

Section 1. Declaration and Claim

HMRC Reference:

Under s.55b ITA 2007 myself, detailed below, would like to transfer 10% of my personal tax allowance to my partner, , under the marriage allowance scheme for the applicable years shown on the right. Any overpayments due must only be paid by cheque or BACS to Claim My Tax.

Applicable tax years:	2018/2019	<input type="checkbox"/>	2019/2020	<input type="checkbox"/>
	2020/2021	<input type="checkbox"/>	2021/2022	<input type="checkbox"/>

Section 2. (Transferor)

Full Name	
Address	
Postcode	
National Insurance Number	
Date of Birth	
Date of Marriage	

Transferor Total Earnings:

YES NO

Tax Year 2018/2019, were you unemployed or earning less than £11,850?

Tax Year 2019/2020, were you unemployed or earning less than £12,500?

Tax Year 2020/2021, were you unemployed or earning less than £12,500?

Tax Year 2021/2022, were you unemployed or earning less than £12,570?

Section 2A. Authorisation (Transferor)

HMRC Reference:

Applicable tax years:	2018/2019	<input type="checkbox"/>	2019/2020	<input type="checkbox"/>
	2020/2021	<input type="checkbox"/>	2021/2022	<input type="checkbox"/>

Full Name:	Date:	Signature:

Section 3. (Recipient)

Full Name	
Address	
Postcode	
National Insurance Number	
Date of Birth	

Recipient Total Earnings:

YES NO

Tax Year 2018/2019, was your income between £11,851 and £46,350?

Tax Year 2019/2020, was your income between £12,501 and £50,000?

Tax Year 2020/2021, was your income between £12,501 and £50,000?

Tax Year 2021/2022, was your income between £12,571 and £50,270?

Section 3A. Deed of Assignment (Recipient)

HMRC Reference:

I, , claim repayment of the amount owed to me and unconditionally assign the amount due for those tax years highlighted on the right:

Applicable tax years:	2018/2019	<input type="checkbox"/>	2019/2020	<input type="checkbox"/>
	2020/2021	<input type="checkbox"/>	2021/2022	<input type="checkbox"/>

Full Name:	Date:	Signature:

Section 4. Form 64-8 (Authorising Your Agent)

We, and detailed above, authorise HMRC to disclose information to: **Claim My Tax Limited, 28 Orchard Road, St Annes On Sea, Lancashire, FY8 1PF** Agent codes (SA/CT/PAYE): **SA: 2530AR PAYE: HY7247**. We agree that the nominated agent has agreed to act on our behalf as individual tax payers in relation to our tax affairs. This authorisation is limited to Pay As You Earn and Self Assessment.

Signature:	Date:	Signature:	Date: