

# The **Entitlements** Agency

Tax Rebate Services  
**0800 612 28 04**  
www.TaxRebate.co.uk

Dear Sir/Madam,

Thank you for your interest in claiming a tax refund. You are **1** step away from **re-claiming** what's rightfully yours.

## **What you need to do**

- 1** Please complete the first page (**Fact Find**) to the best of your ability (the more information we have the faster and larger your refund will be).
- 2** Sign forms **2 and 3** where there is an **X** in the margin.
- 3** Please include any P60s or P45s you may have for the period you wish to claim for.
- 4** Return the forms to: **Freepost RSBH-ZERH-JJHA**  
The Entitlements Agency, St James House, Moody Street, Congleton, Cheshire CW12 4AP.

## **What will happen**

Once your forms are received we will liaise with the Inland Revenue (HMRC) to determine your entitlement. This will be checked to make sure you receive the maximum genuine rebates. Once confirmed your rebate will be sent via cheque. The Entitlements Agency will retain 17% excluding VAT for processing and administration.

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### **The Entitlements Agency Limited**

St James House, 14 Moody Street, Congleton, Cheshire CW12 4AP  
Company Registration No. 06507069. Data Protection Registration No. Z129570X

# The Entitlements Agency

Tax Rebate Services

## Fact Find

**Please complete to the best of your ability as we will use this information.**

Name \_\_\_\_\_ DOB \_\_\_\_\_

Phone number \_\_\_\_\_ Phone number 2 \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Post code \_\_\_\_\_ NI number \_\_\_\_\_

Email \_\_\_\_\_

Name of current employer  
Or previous employer if not currently working \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please tell us which tax year(s) you wish to claim.**

*(The tax year runs from the 6th of April)*

**Finally please tell us why you think you are due a refund.**

*It would be helpful if you could enclose any P45's / P60's that you may have.*

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# The Entitlements Agency

Tax Rebate Services

## Details of Claimant

Full name
Address
Postcode

## Claim

I claim repayment of the amount overpaid by me, (for non SA claims the period or year ended must be entered in the box aside).

/ /

Date

/ /

**If you complete a Self Assessment Return** your repayment will usually be sent direct to you or your nominee's bank or building society account. Please include the branch sort code, the account number and if appropriate, the name and address of the nominee in the authority below. If you or your nominee does not have a bank account, we can arrange for repayment to be made in the form of a payable order but you or your nominee will need to open a bank or building society account in order to cash it. If the repayment is to be sent to your nominee by payable order, the nominee's name and address must be entered in the authority below.

**If you do not complete a Self Assessment Return** your repayment will be made in the form of a payable order, which must be paid into a bank or building society account. If you do not have a bank or building society account you should nominate someone who does to receive the order for you. If the repayment is to be sent to a nominee or posted direct to your bank or building society by payable order, the name and address must be entered in the authority below. Also include your account number and sort code if the payable order is to be posted direct to your bank or building society.

## Authority

I authorise nominee/agent (*delete as appropriate*)\*

**The Entitlements Agency**

of (full address)

**St James House**

**14 Moody Street**

**Congleton, Cheshire**

Postcode **CW12 4AP**

to receive on my behalf the amount due.

Claimant's signature

Date

X

/ /

\*enter the name of the account holder or the person who will receive the payable order.