



Dear tax claimant,

We thank you for choosing Sos Taxes.

We designed a friendly user pack. You can do your tax claim hassle free. Please read carefully the **Instructions for completing forms**.

We aim to provide the best services at the best price with a **No Refund No fee policy**.

We can repay your refund into your UK or overseas bank account, or send a cheque to your home address.

If you would like to talk with someone from our hot line team, just call us on 0800 180 4936. We are pleased to answer from Monday to Friday from 9.00 am to 5.00 pm.

Once we receive your papers we will send you an email to confirm your details.

Best regards,

The Sos Taxes team



Instructions for completing forms

1. The forms

**PLEASE DO NOT FILL THE FORMS
YOU JUST HAVE TO SIGN THE FORMS (in the signature boxes marked with a X).
We will fill the forms in order to avoid any mistake.**

- Sign the form leaving the United kingdom P85 (2 signatures).
- Sign the form Authorising your agent 64-8 (1 signature).
- Sign the form Particulars of Claimant R38 (2 signatures).
- Sign Sos Taxes contracts (1 signature on each, you keep one contract).
- Sign the form P91 (1 signature).

2. Complete the questionnaire

You have to complete the questionnaire in full. It will provide us all the required information to help us to secure your tax claim.

3. Have you enclose all required documentation?

- All signed forms and completed questionnaire.
- Photocopy of your passport
- Original P45's or P60's from every job even if it was part time or short term (Photocopies are not accepted by the Tax Office). A statement of earnings can replace a lost P45 or P60.
- Any additional information you think may be useful for your tax claim.

4. Once we receive your papers we will send you an email to confirm your details



CONTRACT

1. I _____ have instructed Sos Taxes to act as my agent for my tax refund. To this effect, I have completed and signed form 64-8.
2. I have completed the questionnaire (1 page) in full and certify that the information I gave is correct (If I do not provide Sos Taxes the correct information, a resubmission fee of £50 may be applicable).
3. I agree that the refund will be made payable to Sos Taxes.
4. This contract is binding on both parties until the completion of payment made by Sos Taxes.
5. Sos Taxes will apply a commission of 10%. Also our policy "No rebate, No fee" applies (Clients will be subject to a minimum charge of £39, you will not pay the minimum charge and the commission).
6. The commission rate is VAT free.
7. All correspondence, telephone, fax and postal costs will be paid for by Sos Taxes (inclusive in the fee).
8. A bank transfer to an overseas country cost £40 (you can ask to receive a cheque in the questionnaire).
9. Sos Taxes reserve the right to refuse to carry out any claim without any reason.
10. If a document is missing (P45 or P60) and if you cannot find it, Sos Taxes can get a statement of earnings on your behalf to replace it. Each document successfully obtained will be charged £10.
11. None of the above clauses affect your statutory rights.

I HAVE READ THE ABOVE CONTRACT AND AGREE TO THE TERMS AND CONDITIONS LISTED.

Date:

Client signature:

Signed on behalf of Sos Taxes Ltd:

Ref No:



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Signed on behalf of Sos Taxes Ltd:

Ref No:

PLEASE FILL THIS QUESTIONNAIRE IN FULL

General information

FULL NAME			
NATIONALITY			
NATIONAL INSURANCE No			
DATE OF BIRTH			
BIRTHPLACE			
E-MAIL ADDRESS			
UK ADDRESS			
UK POSTCODE			
OVERSEAS ADDRESS			
OVERSEAS ADDRESS			
CONTACT TEL No			
ARE YOU MARRIED?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	DATE OF MARRIAGE <input type="text"/>
WIFES/HUSBANDS NAME	<input type="text"/>	WIFES/HUSBANDS DOB	<input type="text"/>
HOW DID YOU HEAR ABOUT US?			

Residence information

When did you arrive in the UK?

When did you leave the UK? (or when are you leaving?)

If you are leaving the UK (or have left) do you intend to work again in the UK in the next 12 months? YES NO

Enter your last employer details before entering the UK (with start and finish dates)

Have you previously claimed a tax rebate in the UK? YES NO

If yes, which tax year?

Employment history

Start date	Finish date	Company name	Company address

Payment

Please specify the preferred method of payment with details supplied below:

I want to receive the refund on my bank account | I prefer to receive a cheque at this address

BANK NAME	<input type="text"/>	<input type="text"/>
BANK ADDRESS	<input type="text"/>	<input type="text"/>
COUNTRY	<input type="text"/>	<input type="text"/>
ACCOUNT HOLDERS NAME	<input type="text"/>	<input type="text"/>
ACCOUNT No	<input type="text"/>	<input type="text"/>
SORT CODE	<input type="text"/>	<input type="text"/>

Client signature Date



Please use your tax reference and National Insurance number if you contact us.

You could end up paying too much tax if you do not complete this form.

I need to check that the record of your recent jobs (or any periods when you were not working) since the date shown in Box A is correct.

To do this I need your help. Please answer the questions on this form and then return it to me in the envelope provided.

Box A

Current details

If you are employed, please enter the full name and head office address of your employer

Employer's name
Address
Postcode

The address where you work, if this is different

Address
Postcode

The date you started this job
/ /

Your works or payroll number if you have one

The amount of your weekly or monthly pay before deductions £ <div style="border: 1px solid black; width: 150px; height: 25px; display: inline-block;"></div>	How often are you paid? <i>✓ as appropriate</i> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/>
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If you are not employed , are you claiming Jobseekers Allowance?	<i>✓ as appropriate</i> Yes <input type="checkbox"/> No <input type="checkbox"/>
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If so, please enter the address of the Benefit Office

Address
Postcode

Weekly amount received

£ <div style="border: 1px solid black; width: 150px; height: 25px; display: inline-block;"></div>	Yes <input type="checkbox"/> No <input type="checkbox"/>
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Are you permanently retired? Yes No

If you receive a pension, other than a Forces Disability or War Widows pension, please enter who pays the pension

Pension number

Weekly or monthly amount £ <div style="border: 1px solid black; width: 150px; height: 25px; display: inline-block;"></div>	How often is the pension paid? Weekly <input type="checkbox"/> Monthly <input type="checkbox"/>
---	--

Date the pension started
/ /

Please turn over

Current details continued

If you are self-employed, please enter the name and address of the business

Business name
Address
Postcode
Date the business started
/ /

If you are a partner, please enter the full name of the partnership

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Please complete in all cases

Your address (if not correct over the page)

Address
Postcode

Telephone number (including national dialling code)

/

Signature

X

Your National Insurance number (if not correct over the page)

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Date of birth

/	/
---	---

Date

/	/
---	---

Employment history

We would like to know what you did since the date shown in BOX A on the front page. Please list in date order, all the jobs you had and any periods when you were out of work. Please continue on a separate sheet if needed.

Date from/to <i>For example</i> Oct 03/Jan 04	Tick the appropriate box that applies to you <input checked="" type="checkbox"/>	Employed - enter your employer's full name, address and tax reference number Self-employed - enter your business name and address Jobseekers Allowance or Incapacity Benefit - enter the name of your Benefit Office	Total weekly income before stoppages and payroll or works number
/	<input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Jobseeker <input type="checkbox"/> Incapacity Benefit <input type="checkbox"/> Not earning	Full name Address Postcode Tax reference	£ . .
/	<input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Jobseeker <input type="checkbox"/> Incapacity Benefit <input type="checkbox"/> Not earning	Full name Address Postcode Tax reference	£ . .
/	<input type="checkbox"/> Employed <input type="checkbox"/> Self-employed <input type="checkbox"/> Jobseeker <input type="checkbox"/> Incapacity Benefit <input type="checkbox"/> Not earning	Full name Address Postcode Tax reference	£ . .

4. How you want to be paid any money we owe you

Not everyone gets a refund. If we owe you any money, we can either pay it to you or someone else on your behalf - this is known as a 'nominee'. Please choose one of the following two options:

<input type="checkbox"/> Option one - Please pay direct to bank or building society	<input checked="" type="checkbox"/> Option two - Please pay by cheque direct to me or my nominee
Bank sort code 20 - 46 - 60	Put 'X' in one box
Account number 80054801	<input type="checkbox"/> Please make the cheque payable to me
Account holder's name SOS TAXES LTD	<input type="checkbox"/> I authorise the cheque to be payable to my nominee Tell us your nominee's name SOS TAXES LTD
Bank or building society name and address Name BARCLAYS Address 193 Camden High Street LONDON Postcode NW1 7PJ	Tell us the address to send the cheque to Linton house 39-51 HIGHATE ROAD LONDON NW5 1RT
Put 'X' in one box	
<input type="checkbox"/> This is my account	
<input checked="" type="checkbox"/> This is my nominee's account	

Declaration

You must sign this declaration.

If you give information which you know is not correct or complete, action may be taken against you.

I declare that

- the information I have given on this form is correct and complete to the best of my knowledge
- I claim repayment of any tax due.

Your signature Date DD MM YYYY

<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
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What to do now

Put an 'X' in relevant box

- I have enclosed parts 2 and 3 of my form P45 *Details of employee leaving work (do not send photocopies)*.
If you have not yet received your P45 from your employer please obtain it before you return this form.
- I can't get a form P45. Please tell us why in the box below, for example because you are retired or a UK Crown servant employed abroad. **If you have a form P45 and don't send it to us, any repayment due to you cannot be made.**

Please send this form to your tax office. You can find your tax office address by:

- going to www.hmrc.gov.uk select *Contact us* and choose *Find your Tax Office*
- asking your employer.

Please complete, sign, then send this form to your HM Revenue & Customs office. Use CAPITAL letters

Date received by HM Revenue & Customs

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).

/	/
---	---

Claimant's signature

X

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*)*

SOS TAXES LTD

of (*full address*)

LINTON HOUSE

39-51 HIGHGATE ROAD

LONDON

Postcode NW5 1RT

~~You~~/your nominee's bank or building society account number (*delete as appropriate*)

80054801

Branch Sort Code

20 - 46 - 60

Agent's reference (*if applicable*)

to receive on my behalf the amount due.

Claimant's signature

X

Date

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