

CISTAX[∞]LINK

The CIS Rebate Specialists



Reclaim your tax in 3 easy steps

CIS tax repaid within 24 hours



Tax Link CIS information pack

Claim you tax back in three easy steps!

CIS Tax Link had claimed hundreds of tax rebates from HMRC. We can help you to claim you tax rebate in 3 easy steps!

Step 1 – Download our pack.

The first step is to download this pack to provide us with your information. This pack will tell you which documents to send so that we can process your claim.

Step 2 – Submit your information.

Step 2 is completing the forms included in this pack. This will provide us with your information so that we can submit your tax return. You should also provide us with the documentation requested in the pack. **You have three options on how to submit the pack:**

1. **Pop it in the post!** We will send you a text as soon as we receive your pack in the post and will keep you updated once the return is ready for your approval.
2. **Email it to us at enquiries@cistaxlink.co.uk.** Once we receive your information, we will send you a text message or an email when your tax return is ready for your approval. It is easy to approve the tax return. Print, sign and scan the return for immediately submission! If you prefer, you can also send the tax return to you by post for your signature.
3. **Give us a call!** Not good with paperwork? Call us on 0203 355 3760 or 0800 524 4206 and we will complete the form for you. We are happy to take your information, complete the documents and then inform you of the next steps.

**Hate paperwork?
Need help?**

**Call us on 0203 355 3760 or
0800 524 4206**

Step 3 – Get your tax back and enjoy!

After you had downloaded our pack, submitted the information and approved your tax return, you can sit back and relax. Your tax rebate is on its way.

You have a choice on how you want to receive your tax repayment.

1. **Receive your tax rebate right into your bank account.** This is the fastest means to get your tax back. Ensure that you provide us with your banking details in our pack.
2. We will send a **cheque** to your home address.

1. Personal information

First Name	
Middle Name	
Surname	
Address 1	
Address 2	
Address 3	
Town	
Postcode	
Email address	
UTR Number	
National Insurance Number	
Date of Birth	
Nationality	
Business activity/ Trade	
Home number	
Mobile Number	

Do you have a current VIA or had you been declared bankrupt in the last two years?	
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If you want to receive your tax repayment straight into your bank account, please complete your banking details below. If you want to receive your refund by cheque, you can move on to the next section.

Bank:	
Name of account holder:	
Account Number:	
Sort Code:	

2. Income Details – PAYE and Employment income.

Employer 1

Employer's name	
PAYE ref Number	
Gross Income	
Tax	

Employer 2

Employer's name	
PAYE ref Number	
Gross Income	
Tax	

Employer 3

Employer's name	
PAYE ref Number	
Gross Income	
Tax	

3. Income Details – Other income.

	Yes or No	Net	Tax	Gross
Interest Income	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Taxable benefits	<input type="checkbox"/> Yes <input type="checkbox"/> No			
State pension	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Private pension	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Other work	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Dividends	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Investments	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Other income	<input type="checkbox"/> Yes <input type="checkbox"/> No			
Rental income	<input type="checkbox"/> Yes <input type="checkbox"/> No			

If you receive rental income, we will require more information. Please provide us with the total rental income received, any costs relating to the property and confirm if the property is furnished.

4. Past and current tax affairs

Last filed Tax Return	05 April YYYY
Tax Repayment Received	£
When did your business start?	DD / MM / YYYY
Do you have any overdue tax or current tax due?	
Do you owe any NIC2?	
If yes to the above questions, how much?	
Did HMRC ever open an enquiry into your tax return?	
If yes, when and do you know why?	

5. Income Details - Deductions

Do you make private pension contributions?	
If Yes, how much did you contribute for 2014/2015?	
Do you have a student loan?	
Did you receive child benefits?*	
If yes, how much did you receive and how many children do you have?	

*This will only apply if you earned more than £50,000 per annum.

6. Income Details – All Earnings

Total earnings*	£
Total CIS/Tax deducted*	£

*Unless you have other income, this will usually agree with your CIS vouchers that should be provided to CIS Tax Link.

7. Expenses – Travel Expenses

If you use your vehicle for business purposes, please complete the following:

Vehicle Make and Type	
Registration Number	
Price	£
Date of Purchase	
% Business Use	
Road Tax	£
Vehicle insurance	£
Fuel costs	£
MOT, repairs, other	£
Parking and tolls	£

Hotel expenses	£
Meals and subsistence	£
Train fees	£
Taxis	£
Buses and other public transport	£
Air ticket and other	£

Business Mileage	
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8. Expenses – Materials and tools

Building materials	£
Protective clothing	£
Tools	£
Other building consumables	£
Subcontractors paid by you*	

*You should have a valid invoice and UTR number for subcontractor expenses.

9. Expenses – General Admin

Telephone expenses	£
Mobile phone	£
Stationery	£
Postage	£
Computer expenses	£

10. Expenses – Other expenses

Interest expenses	£
Bank charges	£
Insurance	£
Training expenses*	£
Any other cost	£
Details of other costs	

*Only training expense that enable you to do your current trade is deductible.

Notes:

The above expenses should be wholly and exclusively for the purpose of business. HMRC may ask to see receipts for all expenses and you should therefore keep receipts for a period of 6 years.

If you did not keep detailed records or if you enter estimated figures, your refund may be restricted.

If you enter round amounts (i.e. £500 or £3,000) it may raise suspicion with HMRC. Always ensure that you list the exact expenses incurred. Please be as precise as possible and include pence.

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.

I, (print your name)

of (name of your business, company or trust if applicable)

authorise HMRC to disclose information to

(agent's business name) TAX LINK ACCOUNTANTS

I agree that the nominated agent has agreed to act on my/our behalf, and the information is correct and complete. The authorisation is limited to the matters shown on the right-hand side of this form.

Signature see note 1 overleaf before signing

Date

Give your personal details or Company registered office here

Address

Postcode

Telephone number

Give your agent's details here

Address

THE LONG LODGE

265-269 KINGSTON ROAD

WIMBLEDON

Postcode SW19 3FW

Telephone number 0208 540 1920

Agent codes (SA/CT/PAYE) W0834H

Client reference

Please tick the box(es) and provide the reference(s) requested **only** for those matters for which you want HMRC to deal with your agent.

Individual*/Partnership*/Trust* Tax Affairs ☒ Individual

*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 ☐

Tax Credits ☐

Your National Insurance number (only if not entered above)

If you have a joint Tax Credit claim and the other claimant wants HMRC to deal with this agent, they should sign here Name

Signature

Joint claimant's National Insurance number

Corporation Tax ☐

Company Registration number

Company's Unique Taxpayer Reference

NOTE: Do not complete this section if you are an employee. Only tick the box if you are an employer operating PAYE

Employer PAYE Scheme ☐

Employer PAYE reference

For official use only

SA ☐
NIRS ☐
COP ☐
NTC ☐

COTAX ☐
EBS ☐
VAT ☐
COP link ☐

VAT ☐ (see notes 2 and 5 overleaf)

VAT registration number

If not yet registered tick here ☐

1 Who should sign the form

If the authority is for

Who signs the form

You, as an individual

You, for your personal tax affairs

A Company

The secretary or other responsible officer of the company

A Partnership

The partner responsible for the partnership's tax affairs. It applies only to the partnership. Individual partners need to sign a separate authority for their own tax affairs

A trust

One or more of the trustees

2 What this authority means

• For matters other than VAT or Tax Credits

We will start sending letters and forms to your agent and give them access to your account information online. Sometimes we need to correspond with you as well as, or instead of, your agent.

For example, the latest information on what SA forms we send automatically can be found on our website, go to www.hmrc.gov.uk/sa/agentlist.htm or phone the SA Helpdesk on **0845 9 000 444**.

You will not receive your Self Assessment Statements of Account if you authorise your agent to receive them instead, but paying any amount due is your responsibility.

We do not send National Insurance statements and requests for payment to your agent unless you have asked us if you can defer payment.

Companies do not receive Statements of Account.

• For VAT and Tax Credits

We will continue to send correspondence to you rather than to your agent but we can deal with your agent in writing or by phone on specific matters. If your agent is able to submit VAT returns online on your behalf, you will need to authorise them to do so through our website. For joint Tax Credit claims, we need both claimants to sign this authority to enable HM Revenue & Customs to deal with your agent.

3 How we use your information

HM Revenue & Customs is a Data Controller under the Data Protection Act 1998. We hold information for the purposes specified in our notification to the Information Commissioner, including the assessment and collection of tax and duties, the payment of benefits and the prevention and detection of crime, and may use this information for any of them. We may get information about you from others, or we may give information to them. If we do, it will only be as the law permits.

We may check information we receive about you with what is already in our records. This can include information provided by you, as well as by others, such as other government departments or agencies and overseas tax and customs authorities. We will not give information to anyone outside HM Revenue & Customs unless the law permits us to do so.

This authority does not allow your agent to request personal information held about you under the subject access provisions of the Data Protection Act 1998.

Further information can be found on our website, www.hmrc.gov.uk

4 Multiple agents

If you have more than one agent (for example, one acting for the PAYE scheme and another for Corporation Tax), please sign one of these forms for each.

5 Where to send this form

When you have completed this form please send it to:

HM Revenue & Customs, Central Agent Authorisation Team, Longbenton, Newcastle upon Tyne, NE98 1ZZ.

There are some exceptions to this to help speed the handling of your details in certain circumstances.

If this form:

- accompanies other correspondence, send it to the appropriate HM Revenue & Customs (HMRC) office
- is solely for Corporation Tax affairs, send it to the HMRC office that deals with the company
- is for a Complex Personal Return or Expatriate customer, send it to the appropriate CPR team or Expat team
- accompanies a VAT Registration application, send it to the appropriate VAT Registration Unit
- has been specifically requested by an HMRC office, send it back to that office.

Your Self Addressed slip

Please return all your CIS vouchers, the completed pack and the signed 64-8 form to us. Then cut out our 1st class freepost address slip below, glue it onto an envelope and pop it in the post.



Freepost Plus RTRY-UBXL-ZSJG
Tax-Link CTA Limited
265-269 Kingston Road
London
SW19 3NW



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