

POA Tax Refund Assessment Form

COMPLETE AND RETURN THIS FORM TO FIND OUT IF YOU MIGHT BE OWED A TAX REFUND

NOTE: If you are currently (or have been in the past 4 years) self-employed, either part-time or full-time, or you fill in a Self Assessment Tax Return, please **DO NOT** return this form as we are unable to review your tax.

Title (Please ✓) Mr Mrs Miss Ms Other Please specify

First Name

Surname

E-MAIL ADDRESS:

YOU MUST PROVIDE YOUR EMAIL ADDRESS. PLEASE USE **BLOCK CAPITALS** AND USE A SEPARATE BOX FOR EACH LETTER, NUMBER OR CHARACTER. **WE WILL REPLY TO YOU BY EMAIL** SO IF YOU DO NOT PROVIDE A VALID EMAIL ADDRESS, WE WILL NOT BE ABLE TO CONTACT YOU.

Are you currently - (please ✓ the box that applies to you) Employed Unemployed Retired Employed & receiving a pension

Industry: If not a Prison Officer please state your employer below

Occupation or Job Title

Current Marital Status: (please ✓) Single Married/Civil Partnership Separated Divorced Widowed

If applicable: Date of Marriage/ Civil Partnership or Date Widowed

PLEASE ✓ THE CORRECT ANSWER

During the LAST tax year (2020/2021) did your spouse/civil partner pay tax? Yes No
During the PREVIOUS tax year (2019/2020) did your spouse /civil partner pay tax? Yes No
Are you over 17 years old? Yes No

Since 6th April 2017 have you:

Paid Professional Membership Fees / Union Fees / Subscriptions? Yes No
Been required to wear a uniform, protective clothing or workwear showing your employers logo? Yes No
Been required to work from home or been forced to work from home due to COVID-19? Yes No
Had a Company Car? Yes No
Used your own car for business mileage (not including travel to and from your usual place of work)? Yes No
Been given a P11D form by your employer (you would have been given one if you had a benefit eg. company car, health insurance, gym membership)? Yes No
Paid Income Tax in the UK? Yes No
Been continuously employed in the UK? Yes No
Been paid more than £42,000 per year? Yes No
At any time received other income or benefits in addition to your Main Income (NOT including tax credits eg. child tax credit, working tax credit, child benefit)? Yes No