

# 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