

TAX REBATES SINCE 1979

G. Lewin & Co

Unit 5, 25-27 The Burroughs

London

NW4 4AR

Tel: 020 8203 7715 Fax: 020 8202 4733

Email: Gerald@glewin.co.uk

Directions to get here

Public Transport	<p><u>Underground</u></p> <p>Nearest station – Hendon Central Underground Station. Turn right when you come out of the station, walk up to the traffic lights, turn right and walk 20 yards to the bus stop outside London Brookes College. Opposite the bus stop you will see Hendon Sign Co. Walk through the entrance and you will see our name on the first office building on the right.</p> <p><u>Bus</u></p> <p>The following buses stop opposite the office: 143, 183, 326, 643, 653 & 683. The bus stop is called Watford Way</p>
Car	<p>There is a small car park next door to us at Burrough Gardens (opposite Bathrooms International). You have to pay by mobile using a debit/credit card (you cannot pay with coins). If the car park is full, turn right into Brampton Grove and right again into Wykeham Road (or right again into Prothero Gardens). There is also some FREE parking availability on the other side of Watford Way – Several roads off Station Road NW4 4NJ (not between 10-11am). Do not use the car park on the other side of our building opposite London Brookes College unless after 5:30pm as this is permit only.</p>

NB. YOU NEED PHOTO ID TO GET CASH FROM THE BANK

CIS TAX REBATES
Only 2 FORMS TO COMPLETE
(JUST SIGN THE OTHERS)

WE WILL PAY YOU YOUR FULL TAX REBATE
(LESS OUR 30% FEE)

ON THE SPOT IF YOU COME TO OUR OFFICE
OR
WITHIN 24 HOURS BY POST

ONLY
IF YOU GIVE US THE FOLLOWING ITEMS
COVERING THE YEAR FROM 6 APRIL 2023 TO 5 APRIL 2024
(known as the 2023/2024 year)

1. YOUR CIS STATEMENTS FROM YOUR CONTRACTORS. WE NEED 12 MONTHLY STATEMENTS OR A LETTER FROM YOUR CONTACTOR GIVING THE TOTAL FIGURES (GROSS AND TAX DEDUCTED) FOR THE YEAR TO 5TH APRIL 2024 UNLESS YOU HAVE THE ABOVE, PLEASE SEND US YOUR BANK STATEMENTS AND CIRCLE ALL YOUR CIS EARNINGS COVERING 01ST APRIL 2023 – 01ST MAY 2024.
2. IF YOU WERE EMPLOYED ON THE CARDS SEND IN ALL YOUR P60'S/P45'S ETC
3. IF YOU WERE SIGNING ON PLEASE SEND US A LETTER FROM THE BENEFIT OFFICE STATING DATES AND AMOUNTS OF TAXABLE BENEFIT RECEIVED, AS WELL AS P45'S ETC PHONE 0800 169 0310 FOR HELP

FAILURE TO STRICTLY FOLLOW THE ABOVE
WILL AFFECT YOUR REBATE

G. Lewin & Co
Accountants & Tax Consultants
Unit 5, 25-27 The Borroughs, London, NW4 4AR TEL: 0208 203 7715 FAX: 0208 202 4733

GETTING REBATES FOR OUR CLIENTS SINCE 1979

PLEASE COMPLETE THIS FORM

1. Client Details

Full Name _____
Full Address Including Postcode _____

2. Please state if you are a Previous or New Client
Previous / New

If new how did you hear about us?

Email _____
Mobile No. _____
Date of Birth _____
Nationality _____
Single/Married/Widowed/Divorced/Separated _____
What is your trade _____
When did you become self-employed _____
Are you still on CIS _____ (Yes/No)

Office Use Only: Date Stamp When Received:

3. Tax Details

UTR (10 Number Tax Reference) _____

National Insurance No. _____

Do you have any Tax Arrears?	Yes /No	If yes, how much?
Do you have National Insurance Class 2 Arrears?	Yes / No	If yes, how much?

Have you done your 2022/2023 tax return? Yes/ No _____

Have you claimed Benefit in this Tax Year (2023/2024) Yes /No If yes, see Yellow Sheet _____

Were you employed (paye/on the cards – not cis) in this Tax Year (2023/2024) Yes /No If yes, see Yellow Sheet _____

Are you under enquiry from the tax office? Yes/No _____

Are you or have you ever been bankrupt? Yes/No _____

WARNING: It is a criminal offence to deliberately give false information or withhold information. If you have Income Tax Arrears or National Insurance Arrears / Benefit Income/ PAYE earnings/Bankruptcy details/already received a tax rebate for this year etc. and do not declare them to us and if subsequently any of these items affect our ability to reclaim the full rebate then we always prosecute the debt and pass your records directly to the CID.

4. How to Speed Up Your Rebate

If you want your rebate on the spot/24 hours by post, then simply follow **ALL** the instructions on the **YELLOW SHEET (SECOND PAGE)**.

5. How do you Want to be Paid?

Please tick to indicate how you want us to pay your rebate to you.

1. By **Cash** to personal callers at the Nat West Bank near our office: you need photo ID

2. By **Cheque** sent to your address (payable to a nominee if your prefer): authorised payee:

3. By **Direct Credit into your Bank Account** (or a nominee if you prefer) authorised payee:

If Direct into Bank, please state Name of Bank _____ Name of Account Holder _____

Bank Sort Code _____ Bank Account Number _____

6. Claiming Business Expenses

PLEASE COMPLETE EXPENSES FORM AND IF YOU ARE NOT ALREADY DOING SO PLEASE START KEEPING PROPER RECORDS FROM NOW ON

What to do Next

- The **ONLY** forms to complete are the one above and the expenses form (all other forms should be only signed and **not** completed).
- Sign all White Forms** where indicated 'X', But please **Do Not** complete them.
- Send in your **original CIS/P45/P60 & Benefit Details plus details of any other income earned April 2023 to April 2024. Keep photocopies of all forms you send us**
- NEW CLIENTS ONLY** - Send a **photocopy** of your CIS card (if you have it) and passport (photo page) or driving licence. Please **do not** send originals .
- Then send all forms back to us in the freepost envelope (no stamp required).**

G. Lewin & Co.

Accountants & Tax Consultants

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DO NOT COMPLETE YOUR EXPENSES FORM BEFORE READING THIS

Please bring in or send in ALL your receipts for expenses. Please divide your receipts into different expenses e.g. Put all your travel/motor receipts in one envelope and write the total amount on top of the envelope, then put all your tools and protective clothing receipts in a second envelope and write the total amount on the top of that envelope. Do separate envelopes and totals for each expense e.g. Public liability insurance, courses, subscriptions, cash chequing, telephone etc.

IF YOU DO NOT HAVE RECEIPTS FOR YOUR EXPENSES

If you do not have receipts for your expenses please ensure you obtain receipts for all expenses from now on. For this year please make an estimate of your expenses, (try to be accurate e.g. 42 weeks at £30 travel = £1260 rather than £1200), up to a maximum of 10% of your earnings e.g. if your earnings are £20,000 before 20% tax deducted, then your expenses should not be more than £2000.

FAILURE TO STRICTLY FOLLOW THE ABOVE WILL AFFECT YOUR REBATE

EXPENSES FORM

EXPENSES - 6 APRIL 2023 to 5 APRIL 2024

If you are estimating your figures please try to be as accurate as possible rather than giving round figures

Ignore this column
for office use only



Please enter figures
in this column



Box 10	Tools, protective clothing & cleaning	£
Box 11	Motor expenses - petrol, insurance, road tax, servicing, repairs, parking, congestion charge, (see below for buying car/van)	£
Box 11	Trains, buses, taxis, hotel, bed and breakfast (for work)	£
Box 16	Bank Charges/Cashing cheques	£
Box 17	Telephone (business use) printing, postage, stationery, computers & any other office expenses	£
	Public Liability Insurance	£
	Courses	£
	Subscriptions	£
	Any other expenses please tell us what these are and the amounts	£
	Do you use a car for work	£
	Do you use a van for work	£
	Date of purchase	
	Cost	
	% of business use	

I confirm that the above figures are true and should be stated on my tax return

SIGNED X..... PRINT NAME..... DATE.....

FOR OFFICE USE ONLY

RECEIPTS RECEIVED

BANK STATEMENTS

FOR THE ATTENTION OF H.M.R.C

UTR:

NINO:

I hereby irrevocably and
unconditionally release and assign all my right to my income tax rebate
for to G. Lewin & Co. of Unit 5, 25-27 The Burroughs,
London, NW4 4AR

X

Date:



Authorising your agent

This form was updated in March 2022.

Read the Notes on page 3 before filling in this authority
If you do not have an agent but would like another person to communicate with HMRC on your behalf follow the guidance at www.gov.uk/appoint-tax-agent

This form overrides any earlier authority given to HMRC. HMRC may contact you in the future to reauthorise your agent relationship to comply with the UK General Data Protection Regulation (UK GDPR). For more details on what your agent will have access to, follow the guidance at www.gov.uk/government/publications/tax-agents-and-advisers-authorising-your-agent-64-8

To change your agent or withdraw your consent
Follow the guidance at www.gov.uk/guidance/change-or-remove-your-tax-agents-authorisation

Multiple agents

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

I, (print your name)
of (name of business, company or trust if applicable)
authorise HMRC to disclose information to (agent's business name)

Give your personal details or company registered office here

Address
Postcode
Phone number

I confirm that the nominated agent has agreed to act on my behalf, and the authorisation is correct and complete.
This authorisation is limited to the matters indicated on this form.

Signature
Date

Give your agent's details here

Address
Post code
Phone number
Agent code (SA)
Agent code (CT)
Client reference

Self Assessment If you tick this box you must give your National Insurance number (NINO) and/or your Unique Tax reference (UTR)

Partnership If you tick this box you must give your Unique Tax reference (UTR)

Your agent will have access to your Self Assessment and Partnership information such as your income, tax, national insurance, pension as well as your personal and financial information. For more information go to www.gov.uk/selfassessment

National Insurance number

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Unique Tax reference (UTR) if applicable

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If UTR has not been issued yet tick here

If you're a Self Assessment taxpayer, we'll send your Statement of Account to you, but if you would like us to send it to your agent instead tick here

Paying any amount due is your responsibility.

Trust

Your agent will have access to your personal and financial information for your trust. For more information go to www.gov.uk/trusts-taxes

Unique Tax Reference (UTR) if applicable

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Individual Pay As You Earn (PAYE)

Your agent will have access to your PAYE information such as your income, tax, national insurance, pension as well as your personal and financial information. For more information go to www.gov.uk/topic/personal-tax/income-tax

National Insurance number

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Below you will find a second “authorising your agent” form which also needs to be signed



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I, (print your name)
of (name of business, company or trust if applicable)
authorise HMRC to disclose information to (agent's business name)

Give your personal details or company registered office here

Address
Postcode
Phone number

I confirm that the nominated agent has agreed to act on my behalf, and the authorisation is correct and complete. This authorisation is limited to the matters indicated on this form.
Signature
Date

Give your agent's details here

Address
Post code
Phone number
Agent code (SA)
Agent code (CT)
Client reference

Self Assessment If you tick this box you must give your National Insurance number (NINO) and/or your Unique Tax reference (UTR)

Partnership If you tick this box you must give your Unique Tax reference (UTR)

Your agent will have access to your Self Assessment and Partnership information such as your income, tax, national insurance, pension as well as your personal and financial information. For more information go to www.gov.uk/selfassessment

National Insurance number

Unique Tax reference (UTR) if applicable

If UTR has not been issued yet tick here

If you're a Self Assessment taxpayer, we'll send your Statement of Account to you, but if you would like us to send it to your agent instead tick here

Paying any amount due is your responsibility.

Trust

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Unique Tax Reference (UTR) if applicable

Individual Pay As You Earn (PAYE)

Your agent will have access to your PAYE information such as your income, tax, national insurance, pension as well as your personal and financial information. For more information go to www.gov.uk/topic/personal-tax/income-tax

National Insurance number

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[website:www.instanttaxrebate.co.uk](http://www.instanttaxrebate.co.uk)

**WE PAY £100 FOR
EACH CLIENT YOU
INTRODUCE TO US,
FOR WHOM WE ARE
ABLE TO CLAIM A
REBATE**