

Claim My Tax – Terms Of Business

➤ **The Claims Services**

1. Please note Claim My Tax (CMT) is a trading name of Fylde Office Service Bureau (FOSB) provides tax rebate services in connection with overpayment of tax in the years stated on the claim form, overpayment of tax can arise from many factors including but not limited to; marriage allowance rebates and/or tax deductions on personal savings allowance. The services CMT provides involves investigating and advising upon a potential tax rebate paid by the client to Her Majesty Revenue & Customs (HMRC)
2. In very brief terms, the following are the typical steps CMT would undertake in the course of providing tax rebate services: (a) obtaining initial instructions from the client as to all relevant circumstances giving rise to the tax payment; (b) assessing the information provided and advising the client as to the possibility of claiming a tax rebate; (c) preparing the necessary documentation for a tax refund to be submitted to HMRC; (d) engaging the respondent to the point of settlement with HMRC and confirmation of tax rebate.

➤ **Client’s Obligations**

3. CMT considers that client co-operation is paramount in the rebate process as it enhances the prospects of success. That so, the commitment CMT expects from clients is as follows: (a) providing information and instructions when requested and promptly; (b) completing paperwork; (c) co-operating with CMT all times in the course of the claim process; and (d) not misleading CMT in any way.
4. Client identification – as with other professional services firms. We are required to identify our clients for the purposes of the UK anti-money laundering legislation. We may request from you and retain such information and documentation as we require for these purposes.

➤ **How CMT Keeps its Clients Updated?**

5. Throughout the rebate process, CMT provides regular updates to the client of all material developments. CMT will communicate generally with the client via telephone, post, email & SMS messages.

➤ **CMT Fees**

6. Once a client enters a contract with CMT pursuant to the Terms & Conditions, CMT would be entitled to charge a fee of 35% plus VAT (42%) on the gross amount of rebate received on behalf of the client. The following is an illustration of the amount of the CMT fee if the compensation or redressed recovered from the respondent amounts to:

	£	£	£
Redress Recovered:	1,000.00	3,000.00	10,000.00
CMT Charge @35% PLUS VAT:	420.00	1260.00	4200.00
Net Compensation to Client:	580.00	1740.00	5800.00

Important Note: If the redress recovered by CMT is used applied by the respondent towards arrears owed, the client remains liable to pay out of his/her own funds the fee chargeable by CMT.

➤ **The Right to Cancel**

7. The client can cancel her/his agreement with CMT at any time within 14 days of the clients signature being obtained by CMT without giving any reason and without incurring any liability unless the client or CMT receives any correspondence regarding to the rebate amount or receives a tax rebate from HMRC within this period; in which case CMT’s fee will be due. The client can communicate cancellation of the CMT agreement by any means of communication to CMT.

➤ **The Right to Terminate**

8. The client can terminate her/his agreement with CMT at any time after the 14 days cancellation period (as explained above). In the event the client cancels after 14 days, the client will be charged a £75 admin fee for work carried out with regards to the tax rebate If this occurs, FOSBs fee will be due in full if the client ultimately receives an offer of rebate or receives a rebate from HMRC.