

Get started with RIFT

Please sign and return ASAP

To start working on your claim we need
3 signed forms from you.



What am I signing?

Authorising Your Agent (64-8)

This gives your permission for us to talk to HMRC on your behalf (we need two copies signed).

Registering for Self Assessment (SA1)

This allows us to apply for your UTR (Unique Taxpayer Reference number).

- You'll see where we've **marked what you need to do on each form.**
- Please include your **National Insurance number.**
- To send your forms back to us write **Freepost RIFT** on **any envelope** and pop them in the post.

You've probably already got some great plans for that refund, so don't let the forms delay you getting it.

Forgetting to sign and send the forms is the top reason we see for people not getting what they're owed as quickly as they should.

What happens next:

Visit [RIFTrefunds.co.uk/checklist](https://www.riftrefunds.co.uk/checklist) for a list of the documents we'll need to support your claim and how to send them to us.

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.

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.

Fill in

(print your name)

Fill in

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

XXXXXXXXXXXXXXXXXX

authorise HMRC to disclose information to

(agent's business name)

RIFT Ltd

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

Sign Here

Date

Give your personal details

Address

Fill in

Postcode

Phone number **XXXXXXXXXXXXXXXXXX**

Give your agent's details here

Address **RIFT House, 200 Eureka Park
Upper Pemberton
Kennington**

Ashford, Kent

Postcode **TN25 4AZ**

Phone number **01233 628648**

Agent codes (SA/CT/PAYE) **H8535T**

Client reference

Individual*/[redacted] Tax Affairs
 *delete as appropriate (including National Insurance)

Your National Insurance number (individuals only)
 [][][][][][][][][][][] If you are self employed tick here

Unique Taxpayer Reference (UTR) (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

VAT (see notes 2 and 5 overleaf)

VAT Registration Number
 [][][][][][][][][][] If not yet registered tick here

For official use only

SA	<input type="checkbox"/>	_____ / _____ / _____	COTAX	<input type="checkbox"/>	_____ / _____ / _____
NIRS	<input type="checkbox"/>	_____ / _____ / _____	EBS	<input type="checkbox"/>	_____ / _____ / _____
COP	<input type="checkbox"/>	_____ / _____ / _____	VAT	<input type="checkbox"/>	_____ / _____ / _____
NTC	<input type="checkbox"/>	_____ / _____ / _____	COP link	<input type="checkbox"/>	_____ / _____ / _____

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 Self Assessment (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 9000 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 to:

- check the accuracy of information

- prevent or detect crime
- protect public funds.

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. For more information go to www.hmrc.gov.uk and look for *Data Protection Act* within the *Search* facility.

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 High Net Worth or an expatriate customer, send it to the appropriate High Net Worth Unit or the Manchester Expat Team
- accompanies a VAT Registration application, send it to the appropriate VAT Registration Unit
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Individual* /  Tax Affairs
 *delete as appropriate (including National Insurance)

Your National Insurance number (individuals only)

 If you are self employed tick here

Unique Taxpayer Reference (UTR) (if applicable)

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Phone number	01233 628648
Agent codes (SA/CT/PAYE)	H8535T
Client reference	

~~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

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COP	<input type="checkbox"/>	/	/	/	VAT	<input type="checkbox"/>	/	/	/
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How to get a tax return

If you need to complete a tax return, first you must register for Self Assessment to get a Unique Taxpayer Reference (UTR). If you are in business go to hmrc.gov.uk/register to find out how to register. If you are not in business, you can use this form to give HMRC the information they need to set tax records up for you and your UTR will then be posted to you. To find out if you need to complete this form please go to hmrc.gov.uk/taxreturn.

i Please use capital letters to fill in the boxes.

About you

i Take particular care to complete the questions marked with this symbol.



Title - enter, MR, MRS, MISS, MS, or other title

Surname or family name

First name(s)

Previous surname if applicable

Date of name change DD MM YYYY

i **Your National Insurance number (NINO)**

You must have a NINO before you can register for Self Assessment.

If you do not have a UK NINO you must contact the Department for Work and Pensions on **0845 600 0643**.

If you believe that you do not need a UK NINO please give your reasons below.

i **Your date of birth** DD MM YYYY

If you have been within Self Assessment before, please tell us your previous UTR. You can find this ten-digit reference number on correspondence from HMRC, for example, your Self Assessment statement.

Your address

Postcode

Your daytime contact phone number

Now go to page 2.

Why do you need to complete a tax return?

RIFT will complete this section

i You must complete this section.

Tell us by ticking a box for any of the following reasons that apply to you and entering the relevant date *DD MM YYYY*

I became a company director on

I have been getting income from land and property in the UK from

I have been getting taxable foreign income in excess of £300 a year from

I receive annual income from a trust or settlement from

My annual income will exceed £100,000 from

I have been getting untaxed income that cannot be collected through my PAYE tax code from

My income is over £50,000 and my partner or I will keep getting Child Benefit payments on or after 7 January 2013 from

I have Capital Gains Tax to pay *please indicate tax year* 0 5 0 4

Any other reason *give details below*

I am looking to claim over £2,500 of expenses and to do this I am required to submit a tax return.

What date does this apply from? *DD MM YYYY*

Your declaration

i You must sign and date the declaration.

Sign Here

I declare that

- the information I have given on this form is complete and correct to the best of my knowledge and belief
- I will tell HM Revenue and Customs straightaway if my circumstances or plans change in a way that affects the answers I have given on this form.

Signature

Date *DD MM YYYY*

i Please send your completed form to:

Central Agent Authorisation Team, National Insurance Contributions Office, Benton Park View,
Newcastle upon Tyne, NE98 1ZZ.