

IT'S QUICK AND EASY TO CLAIM YOUR IRISH TAX REFUND.  
PLEASE FOLLOW THE STEPS BELOW:



Complete the pack in **BLOCK CAPITALS** including as much information as possible. Scan or make photos of the completed pack.



Attach any supporting documents to the completed pack before emailing to **irishdocuments@taxback.com**



**OR** post to **Taxback.com, IDA Business and Technology Park, Ring Road, Kilkenny, R95 ETN5**  
Please, only send copies of your receipts and supporting documents as we do not store or return original documents received

There are many reasons why you may be due tax back from Revenue. At Taxback.com, we know that not everyone's tax affairs are the same. That's why there is quite a lot of information in this pack. However, you only need to complete the sections that are bold.

## WHAT HAPPENS NEXT

### **1. Once we receive your information, we'll review it and:**

- a) call you to confirm any outstanding information, or
- b) if no additional information is required, we will send a request to Revenue to register us as your tax agent and get access to your pay and tax details. This process can take between 1 - 2 weeks.

### **2. Having access to your pay and tax details our specialists review your case and:**

- a) contact you for additional information that can help us maximize your refund estimation, or
- b) advise you about the tax refund you are due and file your application.

### **3. As soon as your application is submitted to Revenue:**

- a) we expect an online claim to be processed within 1-2 weeks, dependent on work volumes at Revenue.
- b) applications submitted via myEnquiries may take longer to finalize.

*In the interim period, our Payments Team will get in touch to obtain your preferred payment option, so we can transfer your refund as soon as we receive it.*

**PERSONAL INFORMATION**

|  |   |  |
|--|---|--|
| Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/>   | First Name                                    | Surname                                    |
| Nationality*   | PPS No  | Date of Birth ____/____/____<br>dd mm yyyy |
| Marital status: Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Registered Civil Partnership <input type="checkbox"/> |   |  |
| Please indicate your basis of assessment: Jointly Assessed <input type="checkbox"/> Separately Assessed <input type="checkbox"/> Single Treatment <input type="checkbox"/>   |   |  |
| Name of Spouse   | Spouse Maiden Name                            |  |
| Spouse's Date of Birth ____/____/____<br>dd mm yyyy  | Nationality of Spouse*                        |  |
| Spouse's PPS No  | Date of Marriage ____/____/____<br>dd mm yyyy |  |
| Home Address   | Phone Number                                  |  |
| Email  | How did you hear of our service?              |  |

\* If you or your spouse are a Non EU citizen, please include a copy of Photo Id (such as Passport, Driving License or National ID Card) and information regarding your or their permission to work in Ireland (please supply copy of visa or work permit, if relevant).

**RESIDENCY QUESTIONS**

**Time outside Ireland** If relevant, please state the approximate number of full days you and your spouse spent outside Ireland

|               |            |            |            |            |            |
|---------------|------------|------------|------------|------------|------------|
| <b>You</b>    | 2021 _____ | 2022 _____ | 2023 _____ | 2024 _____ | 2025 _____ |
| <b>Spouse</b> | 2021 _____ | 2022 _____ | 2023 _____ | 2024 _____ | 2025 _____ |

If you have spent significant time in another country or have just moved here we need to know more about your residency

Situation: Please provide information (where relevant):

|               |   |   |
|---------------|---|---|
| <b>You</b>    | Initial entry date ____/____/____<br>dd mm yyyy | Initial entry date ____/____/____<br>dd mm yyyy |
| <b>Spouse</b> | Initial entry date ____/____/____<br>dd mm yyyy | Initial entry date ____/____/____<br>dd mm yyyy |

**Working Abroad** If you have worked abroad in the last 4 years and paid any tax there, please provide details below

|               |  |   |
|---------------|--|---|
| <b>You</b>    | Date started work ____/____/____<br>dd mm yyyy | Date finished work ____/____/____<br>dd mm yyyy |
| <b>Spouse</b> | Date started work ____/____/____<br>dd mm yyyy | Date finished work ____/____/____<br>dd mm yyyy |

|  |  |
|--|--|
| Are you a Politically Exposed Person (PEP)? Or, do you have a close relative / associate that is a Politically Exposed Person (PEP)? | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|--|--|

If your answer is yes, please provide more details of the relevant prominent public function and/or the relative's / associate's relationship to you:

|  |
|--|
|  |
|--|

**INCOME SECTION**

| Tax year   | 2021 | 2022 | 2023 | 2024 | 2025 |
|--|------|------|------|------|------|
| What was your primary occupation and field of industry each year?          |      |      |      |      |      |
| What was your spouse's primary occupation and field of industry each year? |      |      |      |      |      |

**Non-employment Income** If you/your spouse had any source of non-employment income during 2024, please provide details below:

|  |
|--|
|  |
|--|

**TAX CREDITS AND EXPENSES**

**Tax credits and expenses may significantly increase your refund.**

**Rental Credit:** You are entitled to this credit from 2022 to 2025 for yourself or your child/ren.

|   |                                    |  |                             |
|---|------------------------------------|--|-----------------------------|
| Were you in a rental agreement between 2022 and 2025? <i>*Skip the section if requirement is not fulfilled.</i>         |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Did you pay the rent for yourself/your spouse or your child?  |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Did you pay rent for your child under the Rent-a-room scheme/ for 'digs'?   |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Tenancy start date ____/____/____   | Tenancy finish date ____/____/____ | Monthly rent paid €  |                             |
| Landlord/ Estate agent name   |                                    | Landlord's PPS Number (if known)   |                             |
| Landlord/ Estate agent address (if known)   |                                    |  |                             |
| Address of rented property  |                                    |  |                             |
| Eircode   |                                    | Local Property Tax (LPT) number (if known)                                     |                             |
| Did you receive any HAP/RAS or any other State Housing Support Schemes?   |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Is your landlord a Government Minister or a Commissioner of Public Works who owns the property in an official capacity? |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Is your landlord a Housing Authority or a Housing Association?  |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Is there a relation between you and the landlord?*  |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| * If yes, what is the relation?   |                                    |  |                             |
| Is the property registered with the Residential Tenancy Board?*   |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| *If yes, please provide RTB registration number (if known)  |                                    |  |                             |
| Is the property rented under a licence agreement such as the Rent a Room Scheme?  |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Is the property your private residence or is the property used for work or study?                                       |                                    | Private residence <input type="checkbox"/> Work/Study <input type="checkbox"/> |                             |
| <b>If you were paying rent for your child/ren please answer these additional questions:</b>                             |                                    |  |                             |
| Is your child in qualifying third level education ( If not in qualifying 3rd level education - credit is not available) |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| Is your child under the age of 23 at the start of the tax year in which he or she first commenced an approved course.   |                                    | Yes <input type="checkbox"/>   | No <input type="checkbox"/> |
| What date did they (the child) start the qualifying third level Course?   |                                    | ____/____/____   |                             |
| <b>Child's details:</b>   |                                    |  |                             |
| First name  |                                    | Surname  |                             |
| Date of birth ____/____/____  |                                    | PPS number   |                             |
| Address (if different to the claimant's address)  |                                    |  |                             |

| INCOME SECTION   |      |      |      |      |      |
|--|------|------|------|------|------|
| Tax year   | 2021 | 2022 | 2023 | 2024 | 2025 |
| Did you or your spouse pay tuition fees to any educational institute during any of the following years? (paid for yourself or a dependent relative)                                | €    | €    | €    | €    | €    |
| Name of the educational institute, course name, duration and type (part time / full time)  |      |      |      |      |      |
| Did you or your spouse incur any medical expenses during any of the following years? (i.e. doctors' fees, prescribed medicines, diagnostic procedures, physiotherapy, a&e etc.)    | €    | €    | €    | €    | €    |
| Did you or your spouse incur any non routine dental expenses during the years (root canals, crowns and bridgework, orthodontic or periodontal treatment, surgical extraction etc.) | €    | €    | €    | €    | €    |

|  |                    |            |                    |            |                    |            |                    |            |                    |            |
|--|--------------------|------------|--------------------|------------|--------------------|------------|--------------------|------------|--------------------|------------|
| Did your employer make any contribution towards your medical insurance costs as a benefit-in-kind during any of the following years?                       | 2021               | 2022       | 2023               | 2024       | 2025               |            |                    |            |                    |            |
| You  | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Spouse   | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Number of people covered by your medical insurance policy  | 2021               | 2022       | 2023               | 2024       | 2025               |            |                    |            |                    |            |
| You  |                    |            |                    |            |                    |            |                    |            |                    |            |
| Spouse   |                    |            |                    |            |                    |            |                    |            |                    |            |
| Do you pay into a private pension that is completely separate to pension payments made through payroll?  | 2021               | 2022       | 2023               | 2024       | 2025               |            |                    |            |                    |            |
| You  | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Spouse   | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Do you pay personal contributions to an Income Protection Scheme?  | 2021               | 2022       | 2023               | 2024       | 2025               |            |                    |            |                    |            |
| You  | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Spouse   | €                  | €          | €                  | €          | €                  |            |                    |            |                    |            |
| Have you or your spouse worked from home, either full or part-time? Please give us amount of your household expenditure (broadband, electricity and heat). | €                  | €          | €                  | €          | €                  | €          | €                  | €          | €                  | €          |
|  | electricity & heat | broad-band | electricity & heat | broad-band | electricity & heat | broad-band | electricity & heat | broad-band | electricity & heat | broad-band |
| You  |                    |            |                    |            |                    |            |                    |            |                    |            |
| Spouse   |                    |            |                    |            |                    |            |                    |            |                    |            |

| Days spent working from home  | 2021                            | 2022                                    | 2023                    | 2024                       | 2025          |                                     |                                 |   |                      |                                 |   |  |                                 |   |
|---|---------------------------------|---|-------------------------|----------------------------|---------------|-------------------------------------|---------------------------------|---|----------------------|---------------------------------|---|--|---------------------------------|---|
| <b>You</b>  | _____                           | _____                                   | _____                   | _____                      | _____         |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| <b>Spouse</b>   | _____                           | _____                                   | _____                   | _____                      | _____         |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| <b>Staycation Credit</b><br><br>Did you have any spending in qualifying hotels or restaurants between <b>1 October 2020 and 30 April 2021?</b>  | <b>You</b>                      | <b>You</b>                              | <b>Spouse</b>           |                            | <b>Spouse</b> |                                     |                                 |   |                      |                                 |   |  |                                 |   |
|   | 1 Oct 2020- 31 Dec 2020         | 1 Jan 2021 - 30 April 2021              | 1 Oct 2020- 31 Dec 2020 | 1 Jan 2021 - 30 April 2021 |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
|   | €                               | €                                       | €                       | €                          |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| <b>Tax year</b>   | <b>2021</b>                     | <b>2022</b>                             | <b>2023</b>             | <b>2024</b>                | <b>2025</b>   |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| Did you or your spouse pay nursing home costs?  |                                 |   |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| Please confirm the name and address of the nursing home and the PPS number of nursing home resident:  |                                 |   |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| <p><b>Mortgage Interest Relief</b><br/>The relief is available to homeowners with an outstanding mortgage balance of between €80,000 and €500,000 as of 31 December 2022.</p> <p>If your outstanding mortgage balance on your primary home is between 80,000 and 500,000, please give us the following information:</p> <table border="1"> <tr> <td>Outstanding balance on 31 Dec 2022:</td> <td>Mortgage Interest Paid in 2022:</td> <td>Days of mortgage interest paid in 2022:</td> </tr> <tr> <td>LPT Property number:</td> <td>Mortgage Interest Paid in 2023:</td> <td>Days of mortgage interest paid in 2023:</td> </tr> <tr> <td></td> <td>Mortgage Interest Paid in 2024:</td> <td>Days of mortgage interest paid in 2024:</td> </tr> </table> |                                 |   |                         |                            |               | Outstanding balance on 31 Dec 2022: | Mortgage Interest Paid in 2022: | Days of mortgage interest paid in 2022: | LPT Property number: | Mortgage Interest Paid in 2023: | Days of mortgage interest paid in 2023: |  | Mortgage Interest Paid in 2024: | Days of mortgage interest paid in 2024: |
| Outstanding balance on 31 Dec 2022:   | Mortgage Interest Paid in 2022: | Days of mortgage interest paid in 2022: |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| LPT Property number:  | Mortgage Interest Paid in 2023: | Days of mortgage interest paid in 2023: |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
|   | Mortgage Interest Paid in 2024: | Days of mortgage interest paid in 2024: |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| Is there any further information you would like to share with us?   |                                 |   |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |
| <div style="border: 1px solid black; height: 150px; width: 100%;"></div>  |                                 |   |                         |                            |               |                                     |                                 |   |                      |                                 |   |  |                                 |   |

If you'd like help with the forms, let us know and we'll arrange for someone to talk you through filling them out. Please note that we will need a fully completed pack before we can confirm your Irish tax position.



### CUSTOMER AGREEMENT

***The customer agreement forms the basis of the relationship between Taxback and you. It is an important document, please read the points in full and ensure you understand them, before signing Declaration to Revenue.***

#### **I confirm that:**

1. I understand that Taxback.com is a trading name for the services of Taxback Inc., Chicago, USA, and hereby contract with Taxback Inc. to carry out the services described herewith.
2. I understand that Taxback Inc will utilise its parent company Taxback and its subsidiary and aliate companies to gather information regarding the services where necessary and that the contract remains with Taxback Inc for the duration of the service.
3. I have signed the Customer Declaration to authorise Taxback Inc, and / or its subsidiary undertakings trading as Taxback.com and referred to hereafter as the Agent, to prepare this tax return and represent me before Revenue.
4. I commit that I will provide the necessary documentation to Taxback.com to support any refund claim made to Revenue on my behalf.
5. I authorise Taxback.com to be my tax agent to represent me in all communication, submission and correspondence with Revenue for the tax years specified by me.
6. I authorise Taxback.com to:
  - a. Review my earnings, taxes paid, tax credits, expenses, and allowances due and all other specific areas relating to my tax returns and to submit my tax return on my behalf to Revenue.
  - b. Receive all correspondence about my tax aairs and respond as appropriate.
  - c. Organise the payment of taxes due to me or payment of any monies owed by me to the Revenue Commissioners.
  - d. Receive any refunds due from the Revenue Commissioners to me by cheque to the Taxback.com oces or by bank transfer from the Revenue Commissioners into the bank account of Taxback.com. Endorse the cheque(s), deduct the necessary fee and send me the remaining amount.
7. I have not (a) approached or applied to Revenue about these tax aairs or been refused by them for any reason, or, (b) authorised any other party to do so on my behalf. I understand that Taxback.com reserve the right to withhold an amount of the refund (their fee) up to the amount as quoted at the time of estimation of the refund in the event that it transpires that the refund amount is lesser than estimated due to the fact that I had previously received a refund for the relevant tax year.
8. I agree to pay Taxback.com a filing fee for processing my tax return. Should I avail of any additional services, I understand additional fees may apply. Should I owe income tax for other tax years, and the Irish tax authorities deduct this owed money from the refund due for other tax year (s), I understand and agree that I need to pay the Agent a processing fee for each tax year for which a tax return was processed. Should I owe money for any other tax type, and the Irish tax authorities deduct this owed money from the refund due for other tax year(s), I understand and agree that I need to pay the Agent a processing fee for each tax year for which a tax return was processed.
9. Should I receive the refund directly from any other source other than Taxback.com, I agree that I will pay the fee due to Taxback.com for the work completed.
10. I understand that the Irish tax authorities will make the final decision on the value of any refund due or any balance due to them by me and that any estimation given by Taxback.com, is an estimation, not a guarantee.
11. I agree to and accept the terms and conditions of service as written online at [www.taxback.com](http://www.taxback.com) and to any changes in the terms and conditions which Taxback.com may eect from time-to-time, and to the fees of the agent which represents the services I have requested and which are provided by Taxback.com and/or its afliate companies. I want to stay informed and subscribe to receiving communications from Taxback.com relating to new and existing products and services.
12. I understand that information collected in writing and/or verbally for Irish tax return and filing services can and may be used for internal auditing purposes by Taxback.com. I understand that Taxback.com, subject to relevant data protection legislation, will cooperate fully with requests from the Revenue Commissioners to provide them with information collected from me either verbally or in written form in connection with my tax return and that the information may be subject to external audit by Revenue.
13. I have provided true, accurate and complete information regarding my income, taxes, assets and personal circumstances to Taxback.com and I am duly responsible for any discrepancies in the information provided and my annual tax records with the Revenue Commissioners.
14. I commit to updating Taxback.com of any change in my contact or personal details.
15. I understand that Taxback.com will submit my application to the relevant tax oce as soon as I have been informed of the refund amount and have sent all necessary documentation. Should I wish to cancel my application, I will contact Taxback.com immediately. I understand that while Taxback.com will make every eort to recall my application, this may not be possible.

#### **Taxback.com Commitment**

1. We commit to the organisation of the tax return, and any due tax refund of this customer in line with the full information available to us and the legal regulations of the Republic of Ireland, administered by Revenue of Ireland.
2. We commit to transmit any refund due to this customer within three working days, once we have confirmed the payment option and bank details of the client, through a secure method.
3. We commit to providing full information at all times to the customer about his/her tax aairs, through multiple media – secure Tax Tracker® Account, telephone, email and fax.
4. Taxback.com will file tax returns for the tax years requested by the customer. This authorisation to Taxback.com means that Revenue may communicate/ send refunds to Taxback.com for tax years other than the tax years requested by the client, so long as the authorisation application is in place. Should this occur, Taxback.com will inform customer and proceed based on Taxback.com internal procedures.
5. Taxback.com will retain and protect my personal data as per the relevant data protection legislation.