

Sample Claim Letter (Copy, Paste & Customise)

Use the copy-paste letter below to submit an Overpayment Relief claim. Replace the bracketed text, attach the checklist items and send them to HMRC.

[Your Name]

[Your Address]

[Postcode]

[National Insurance Number]

[Date]

HM Revenue & Customs

Pay As You Earn and Self Assessment

BX9 1AS

United Kingdom

Dear Sir or Madam,

Subject line : **Overpayment Relief Claim - [Your Name] - [Tax Year] - [NI no:]**

I am writing to claim repayment of income tax that I believe I overpaid for the tax year(s) shown above.

Summary of issue:

Between [month/year] and [month/year] I (or my employer) paid tax of £[amount paid] under PAYE. I believe the correct tax due for the tax year was £[correct tax] – an overpayment of £[overpayment amount]. The overpayment arose because [brief reason: e.g., duplicate PAYE payment, incorrect tax code, employer reporting error, pension over-deduction].

Enclosed evidence:

1. P60 for [tax year]
2. Payslips for [months] showing tax deducted
3. Bank statement(s) showing payment/duplicate payment
4. HMRC notice: [P800 / coding notice]
5. Employer correspondence: [if applicable]
6. Simple calculation showing how the overpayment was calculated

Requested action:

Please confirm receipt of this claim and arrange repayment of the overpaid tax of £ [overpayment amount] plus any interest if applicable. Please pay the refund to the following bank account:

Account Name: [Your account name]

Sort Code: [xx-xx-xx]

Account Number: [xxxxxxxxx]

Contact details:

Tel: [your phone number]

Email: [your email address]

Declaration:

I confirm that the information given is true to the best of my knowledge.

Yours faithfully,

[Your Signature]

[Your Printed Name]

To get support with claims, feel free to reach out to E2E Accounting and let us help you.

Contact us today.