

Pension tax rebate letter example

Name
Address
Email address
Contact number

PAYE SA
HMRC
BX9 1AS

To whom it may concern,

I am writing to you in order to request a refund on pension contributions I have made above the 40% tax threshold for the previous four tax years.

My details are as follows:

Name –
Address –
NI number –

Gross contributions per tax year:

2019-2020 - £xxx
2020-2021 - £xxx
2021-2022 - £xxx
2022-2023 - £xxx

Based on my calculations, this should result in a rebate of £xxx. If possible I would prefer this by bank transfer or cheque (whichever is possible). Bank details are xxx.

Should you need anything else in order to process this claim, please do let me know.

Best wishes,
Name