

Income Levy Refund Claim Form

for PAYE Employees/Pensioners



This form is to be submitted to your local Revenue office after 31 December

Claimant's Details

| | | | |
|------------|----------------------|---|--|
| Surname | <input type="text"/> | PPS Number | <input type="text"/> |
| First Name | <input type="text"/> | Date of Birth | <input type="text"/> |
| Address | <input type="text"/> | Spouse's Date of Birth (if applicable) | <input type="text"/> |
| | <input type="text"/> | Year for which you are making a claim | <input type="text"/> |
| | <input type="text"/> | Did you hold a full medical card at any time during the year of the claim? (Note: a 'GP only' medical card is not a 'full' medical card) | Yes <input type="checkbox"/> No <input type="checkbox"/> |

Married and Self or Spouse are Aged 65 or over

Please complete this section if, for the year of the claim, you were a married person and you or your spouse were aged 65 or over.

| | |
|---|------------------------|
| Spouse's PPS Number | <input type="text"/> |
| Spouse's Gross Income for Income Levy (if any) for the year of the claim (Note: Social Welfare payments are exempt from the Income Levy and are not to be included here)(Insert Euro figures only) | € <input type="text"/> |

Income Levy Details

Please complete the following section from the Income Levy Certificate(s) which you should have received from your employer(s)/pension provider(s).

Where you had more than one employer/pension provider in the year please add the 'Gross Income for Income Levy' figures from each Income Levy Certificate together and write the total amount in the 'Gross Income for Income Levy in the year' box below. Add the 'Amount of Income Levy Deducted' figures together from each Income Levy Certificate and write the total amount in the 'Amount of Income Levy Deducted in the year' box below.

| | |
|--|------------------------|
| Gross Income for Income Levy in the year (Insert Euro figures only) | € <input type="text"/> |
| Amount of Income Levy Deducted in the year (Including Cent) | € <input type="text"/> |

Refunds

Any refund of Income Levy can be paid by cheque or to your Irish bank account. If you wish to have any refund paid directly to your Irish bank account, please supply your bank account details below.

Account Number

Sort Code

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Note: Any subsequent Revenue refunds will be made to this bank account.

Declaration

During the year of the claim:

Yes No

1. Were you (or your spouse) the holder of an asset that could yield an income? (for example, an owner of a rental property or a holder of shares)
2. Were you (or your spouse) in receipt of fees or commissions which were not subject to PAYE deductions?
3. Were you (or your spouse) involved in a trade, including a trade which is currently operating at a loss as a result of capital allowance entitlements or where profits are covered by use of losses brought forward from prior years?
4. Were you (or your spouse) in receipt of an exempt source of income, such as income from occupation of certain woodlands, profits from stallion fees, stud greyhound services fees, farmland leasing, patent royalty income or earnings of certain writers, artists and composers?

Where you (or your spouse) have answered "Yes" to any of the above questions you should submit this form along with your Return of Income form (Form 11 or Form 12) for the year of the claim to your local Revenue office.

Claimants should note that all Social Welfare payments and income subjected to DIRT are exempt from the income levy.

Penalties apply for making a false claim.

I declare that, to the best of my knowledge and belief, the particulars given by me on this form are correctly stated.

Signature

Date

Telephone Number

Notes

Frequently Asked Questions document

Revenue have published an Income Levy Frequently Asked Questions document, available to download from www.revenue.ie/en/practitioner/law/income-levy.pdf

Enquiries

Enquiries regarding the Income Levy should be directed to your local Revenue office.