



Loan Charge Update - Personal Statement
Individual facing the Loan Charge - Form 2(a)

Loan scheme(s) used / operator(s)

AML, Eximius

Approximate liability in £ (nearest £5K)

£40,000

Amount in £ of any money paid to HMRC so far e.g. APNs, Penalties (nearest £5K)

If your loan has been subject to recall demands :

Who is demanding repayment ?

How many months/years using loan arrangements

And for how much in £

£40,000

not sure

Report of any action to date by and latest communication from HMRC

HMRC has written to me last year asking that i put a charge on my house.

The personal impact (financially and in other ways) so far

I am now retired from NHS. I have been a nurse for many years. It has affected my marital relationship. My wife thinks that I have changed since my mum passed away, but I cannot bear to share how much the Loan charge has also affected me. I prefer to hold this from my family. I feel guilty. HMRC wants to put a charge on my house. The house is co owned with my wife. It is not fair on her and the children. I feel depressed, i feel demotivated.

The personal impact (financially and in other ways) if HMRC enforce the Loan Charge as laid down in the legislation

I have worked as a nurse most of my working life. I do not fee that I have been rewarded. It will affect my retirement, relationship and mental health.