



Loan Charge Update - Personal Statement
Individual who has settled - Form 2(b)

Loan scheme(s) used / operator(s)

Lutea

Approximate liability (nearest £5K)

£10,000

Settlement total figure

£10,000

If your loan has been subject to recall demands :

Who is demanding repayment ?

Further demands from HMRC

And for how much in £

How many months/years using loan arrangements

5

Other Money paid (APNs, Penalties)

Table with 3 columns: Date of Settlement, Settlement period (years/months), % of net income per month. Row 1: 05-Mar-22, [blank], [blank]

The impact of settlement on you financially

I'm struggling financially in my retirement

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

In June 2016 I suffered a stroke, stress was a contributing factor. I first heard about the Loan Charge in February that year, when I got bill from HMRC for over £30,000. I have difficulty sleeping at night through worrying about my finances. At the age of 63, many of my compatriots are happily and comfortably retired. I cannot consider retiring with this hanging over me. I have frequent bouts of depression, which I've never suffered from before. I tend to snap at people, which is probably losing me friends. My family are concerned about my health