

Statement of Facts

For Tax Appeal No. [Insert Appeal Number]

1. Parties

Appellant: [Name, Address, and Tax Identification Number]

Respondent: [Relevant Tax Authority / Officer & Address]

2. Background

The appellant is a taxpayer engaged in [briefly state nature of business or occupation], duly registered under the relevant tax laws of [jurisdiction].

On [date], the appellant received a notice/assessment from the respondent concerning [describe the subject of the dispute]. The assessment/notice pertains to the tax period [state period], and the amount in dispute is [state amount].

3. Facts

1. On [date], the appellant filed tax returns for the period [state period] declaring [state declared income/transaction].
2. The respondent issued a [describe notice/assessment] dated [date] alleging [state the basis or issues raised by tax authority].
3. The appellant responded to the assessment on [date], adducing [list documents/evidence submitted if any].
4. Despite the response, the respondent maintained their position via correspondence dated [date].
5. The present appeal has been filed on [date of appeal], within the prescribed time limits, contesting the issues set out above.

4. Relief Sought

The appellant respectfully requests that the Honorable Tribunal/Commissioner:

- Sets aside the disputed tax assessment/notice dated [insert date];
- Confirms the appellant's declaration and returns for the period [state period];
- Grants any other relief deemed fit by the Tribunal.

5. Verification

I, [Name of Appellant or authorized representative], do hereby verify that the facts stated above are true and correct to the best of my knowledge and belief.

Date: _____ Signature: _____

Important Notes:

- Ensure all facts presented can be substantiated with documentary evidence.
- The statement of facts should be concise, factual, and free from arguments or opinions.
- Include all relevant dates, references, and supporting documents where possible.

- Statement of Facts is a foundational documentâ€”accuracy and honesty are crucial.
- Consult with a tax professional or legal advisor for jurisdiction-specific requirements.