

carry forward contributions

Member Details

Scheme Name

Scheme Reference

Member Name

Earnings Confirmation

Are you subject to the tapered annual allowance for any of the tax years in which you are making, or have made, contributions?

Yes

No

IMPORTANT NOTE

If you have answered 'Yes' to the above questions, please specify the reduced Annual Allowance that applies to you in each of the tax years specified below.

If there is no reduction for a particular tax year, please write 'N/A'.

Tax Year Ending 5 April 2019

£

Tax Year Ending 5 April 2018

£

Tax Year Ending 5 April 2017

£

Contribution Information

Tax Year of Contributions

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A Total gross contributions already paid to all registered pension schemes

£

B Additional gross contributions being paid regularly to the end of the tax year

£

C Additional gross contribution anticipated being paid within the tax year

£

Total of all gross contributions to be paid in the tax year (Sum of A + B + C)

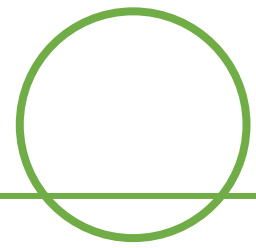
£

Annual Allowance for the Tax Year

£

Total excess contribution that requires the use of Carry Forward

£



Prior Tax Year Information

Tax year 1 year prior to tax year of contributions

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Were you a member of any registered pension scheme, in any capacity, for any part of the tax year?

Yes No

A Total gross contributions already paid to all registered pension schemes for that tax year

£

B Annual Allowance for the tax year

£

Excess amount available for Carry Forward (B-A)

£

Amount of Carry Forward now being used for current tax year excess contributions

£

Tax year 2 years prior to tax year of contributions

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Were you a member of any registered pension scheme, in any capacity, for any part of the tax year?

Yes No

A Total gross contributions already paid to all registered pension schemes for that tax year

£

B Annual Allowance for the tax year

£

Excess amount available for Carry Forward (B-A)

£

Amount of Carry Forward now being used for current tax year excess contributions

£

Tax year 3 years prior to tax year of contributions

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Were you a member of any registered pension scheme, in any capacity, for any part of the tax year?

Yes No

A Total gross contributions already paid to all registered pension schemes for that tax year

£

B Annual Allowance for the tax year

£

Excess amount available for Carry Forward (B-A)

£

Amount of Carry Forward now being used for current tax year excess contributions

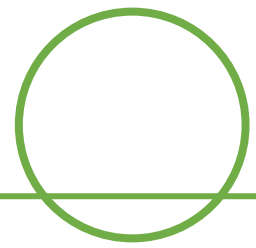
£

IMPORTANT NOTE

If you have answered 'No' to the question concerning your membership of a registered pension scheme for any of the tax years above, you will not be able to use Carry Forward for that tax year.

Please note that for the purposes of Carry Forward you do not need to be an active member of a registered pension scheme in a prior tax year. Various types of membership will still allow you to utilise Carry Forward.

Please seek further financial or taxation advice as necessary.



Pension Savings Confirmation

Have you accessed your pension savings flexibly on or before the tax year of the contributions? Yes No

IMPORTANT NOTE

If you have answered 'Yes' to the above question, you will not be able to use Carry Forward and your contributions for the tax year will be limited to £4,000 for all Money Purchase Schemes.

We strongly recommend that you seek further financial or taxation advice.

Declaration

I hereby declare that:

- 1. The information contained in this form is accurate to the best of my knowledge and belief and no material details have been omitted.
2. I confirm that in calculating the contributions paid to all tax years I have taken account of all contributions to all Registered Pension Schemes to which I am a member.
3. I confirm that I have been a member of a Registered Pension Scheme for each of the tax years to which I am seeking to allocate a Carry Forward amount.
4. I confirm that where I make personal contributions using Carry Forward I understand that the tax relief for the combined total of the contributions will be granted in the tax year in which the contributions are paid. I understand that to qualify for tax relief, I must have earnings equal to the combined total of these contributions.
5. I confirm that I have taken the appropriate advice from my tax and accounting advisers in relation to these contributions.
6. I confirm that I have not accessed pension benefits flexibly on or before the tax year in which I am looking to utilise Carry Forward.

Signed

[Signature box]

Name

[Name box]

Date

[Date grid]

Authorised and Regulated by the Financial Conduct Authority

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