

Lifetime Allowance Supplementary Information Form Financial Assistance Scheme (FAS)



Please complete this form if you expect the total of your benefits (those in payment and those due to come into payment) from all of your pensions to exceed £30,000.00 per annum

Part A Your Personal Details

Title:	<input type="text"/>	Surname:	<input type="text"/>
First names (in full):	<input type="text"/>		
Phone number:	<input type="text"/>	Mobile number:	<input type="text"/>
Email:	<input type="text"/>		
Retirement date:	<input type="text"/>		

Part B Details of Benefits From Other Pension Schemes

Your lifetime allowance (LTA) is the value of benefits you can be paid from all of your registered pension schemes in your lifetime before you have to pay an additional tax charge.

So that we can work out if you'll go over your LTA, please tell us about all your other benefits that you're being paid or you're entitled to.

This includes income drawdown arrangement benefits which have already been designated or are due to be designated on or before the retirement date shown at the beginning of this form.

We don't hold this information on our records. If you don't provide it, we may not be able to give you the final figures of any benefits payable to you.

If you don't have the information needed to complete this form, you should get it from the administrator or provider of your pension arrangement. If you don't know how to get in touch with them, you can get their contact details from the Pension Tracing Service by:

1. Completing an online tracing form at: www.gov.uk/find-lost-pension
2. Writing to them at: Pension Tracing Service, The Pension Service 9, Mail Handling Site A, Wolverhampton, WV98 1LU.
3. Or calling them on: 0345 600 2537

You don't need to include details of the following types of benefit:

1. Any entitlement you have to a spouse or dependant's pension.
2. Pension benefits that you will take after the retirement date at the beginning of this form. These will be tested against the lifetime allowance when you take the benefits.
3. State pensions.

Part B1 Pensions already in payment before 6 April 2006

Only complete this section if you have pension benefits in payment that started before 6 April 2006.

Please tick only one

I'm only in receipt of pension benefits that commenced before 6 April 2006:

Go to **PART B2**

As well as having pension benefits that came into payment before 6 April 2006:

I also receive pension benefits that started on or after 6 April 2006, and/or
I've transferred benefits to a qualifying recognised overseas pension scheme on or after 6 April 2006

Go to **PART B3**

Part B2 Pensions already in payment before 6 April 2006 only

Please provide the current annual rate of pre-April 2006 pension benefits in payment before the deduction of tax.

If you designated funds into an income drawdown arrangement before 6 April 2006, please provide the maximum allowable annual income available based on your last income review.

Current annual pension (£)

Pension 1

Pension 2

Pension 3

Pension 4

Pension 5

If you've completed Part B2, you don't need to complete Part B3.

Please make sure you sign the member declaration in Part F before returning your form.

Part B3 Pensions already in payment before 6 April 2006

You have pension benefits that came into payment before 6 April 2006, as well as having pension benefits that started on or after 6 April 2006 and/or have transferred benefits to a qualifying recognised overseas pension scheme on or after 6 April 2006.

First date a benefit was taken after 5 April 2006
(this should be the earliest date entered in Part C)

On the date entered above, what was the annual amount of pre-6 April 2006 pension in payment before the deduction of tax?

Annual rate of pension on date
entered above (£)

Pension 1

Pension 2

Pension 3

Pension 4

Pension 5

If you designated funds into an income drawdown arrangement before 6 April 2006, please provide the maximum allowable annual income available on the date entered above. This would have been based on the most recent income review at the time and may not be the same as the income you were receiving.

Please make sure you sign the member declaration in Part F before returning your form.

Part C Pensions commencing on or after 6 April 2006 and before the retirement date shown in Part A

Please tick as applicable

I am in receipt of pension benefits that commenced on or after 6 April 2006 and/or I have transferred benefits to a qualifying recognised overseas pension scheme on or after 6 April 2006 and/or I have designated funds for income drawdown.

YES Provide details below
 NO Go to **PART D**

For each pension benefit that commenced payment on or after 6 April 2006 and for each overseas transfer, or income drawdown designation, made on or after 6 April 2006, please provide the following details:

	Percentage of Lifetime Allowance that the total benefits taken represents (at time benefits were taken) (% to 2 decimal places)	Annual pension (£)	Amount of tax-free cash or overseas transfer value (£)	Date the benefit was taken
Event/ Pension 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please tick as applicable

Have you been informed by your pension scheme, since your pension commenced payment, that it has been increased beyond the maximum level?

YES Provide details below
 NO

Percentage of the standard lifetime allowance (%):

In some circumstances, the percentage of the lifetime allowance may increase after benefits were taken. This happens when your pension increases above 5 per cent compound or the retail prices index increase occurs after 6 April 2006. Your pension scheme would have let you know about any increase beyond the maximum level and would have advised you of any additional lifetime allowance crystallised. Where this has happened, the additional lifetime allowance used up should be quoted above.

Please make sure you sign the member declaration in Part F before returning your form.

Part D Pensions from other arrangements coming in to payment on, or before, the retirement date shown in Part A

Please tick as applicable

I have other pension benefits that are due to come into payment on the retirement date shown in Part A

YES Provide details below

NO Go to **PART E**

Details of other pension benefits due to come into payment on or before the retirement date shown in Part A

For each pension that is due to come into payment on the retirement date shown in Part A, please provide the details requested. The last column in the table identifies if the relevant benefit will be treated as having been paid before or after the benefit payable from the FAS. Please also include any income drawdown designations or overseas transfers.

	Percentage of standard LTA that the total benefits taken represents (at time it was taken) (% to 2 decimal places)	Annual pension (£)	Amount of tax-free cash or overseas transfer value (£)	Benefits treated as being paid before FAS benefits taken for LTA purposes
Event/ Pension 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Event/ Pension 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If our tests show that you may be over the LTA limits, we may need to further investigate your entitlement to benefits from other sources.

Please make sure you sign the member declaration in Part F before returning your form.

Part E1 Protection and LTA enhancement

If you've been granted fixed protection 2016 or individual protection 2016, please send us a copy of the letter you received from HMRC confirming your reference number, or (if you applied for the protection online) a print-out of the confirmation from HMRC of your protection.

Please tick

I have a valid enhanced protection certificate	YES	<input type="checkbox"/>	Value of benefits at 5 April 2006 (£):	<input type="checkbox"/>
	NO	<input type="checkbox"/>	Protected cash at 5 April 2006 (£):	<input type="checkbox"/>
I have a valid primary protection certificate	YES	<input type="checkbox"/>	Lifetime allowance factor of:	<input type="checkbox"/>
	NO	<input type="checkbox"/>	Protected cash at 5 April 2006 (£):	<input type="checkbox"/>
I have a valid fixed protection 2012 certificate	YES	<input type="checkbox"/>	<i>By ticking YES you're confirming that your certificate/number is still valid and no action has been taken to revoke your protection</i>	
	NO	<input type="checkbox"/>		
I have a valid fixed protection 2014 certificate	YES	<input type="checkbox"/>	<i>By ticking YES you're confirming that your certificate/number is still valid and no action has been taken to revoke your protection</i>	
	NO	<input type="checkbox"/>		
I have a valid fixed protection 2016 certificate	YES	<input type="checkbox"/>	<i>By ticking YES you're confirming that your certificate/number is still valid and no action has been taken to revoke your protection</i>	
	NO	<input type="checkbox"/>		
Reference number	<input type="text"/>			

Continued on the next page

Part E1 Protection and LTA enhancement (continued)

I have a valid individual protection 2014 certificate YES Personal lifetime allowance(£):

NO

Reference number

I have a valid individual protection 2016 certificate YES Personal lifetime allowance(£):

NO

Reference number

If you've registered for more than one type of protection please tick YES to all.

Part E2 Additional LTA enhancement

Please tick as applicable

I have an enhanced LTA (this doesn't include an enhanced LTA factor gained under Primary Protection) YES Provide details below

NO Go to **PART F**

Details for additional LTA enhancement (**LTA enhancement factor to two decimal places**)

Pension Credit factor (%)

Pre-commencement pension credit factor (%)

Non-residential enhancement factor (%)

Overseas transfer factor (%)

Part F Member declaration

If you wish to use post, please sign and date the form and return to the following address:
Financial Assistance Scheme, PO Box 287, WYMONDHAM, NR18 8EZ

Alternatively, you can send us scans of this form and documentary evidence via our 'Send us a document' facility which is available in the 'Communications' menu when logged in to the Financial Assistance Scheme member website.

I certify that the information I've provided above is correct and complete to the best of my knowledge. If further tax becomes payable because the information I've provided on this form is proven to be incorrect then I understand that I will be wholly and personally liable for the tax charge due and any resultant penalty as may be imposed by HMRC

Signature:

Name:

Date:

Date of birth:

National Insurance number:

For the purposes of the General Data Protection Regulations, the information provided will be used for operating the pension scheme in respect of your interests and as such it may be available to third parties authorised by the Financial Assistance Scheme to process your data.

For more information on how we use your data, please visit our website at:
www.fasmembers.org.uk/en/PrivacyPolicy