

Lump Sum Allowance Supplementary
Information Form

PART A Your personal details

Surname:	<input type="text"/>	Forenames (in full):	<input type="text"/>
Date of Birth:	<input type="text"/>	National Insurance Number:	<input type="text"/>
Telephone Number:	<input type="text"/>	E-mail:	<input type="text"/>

PART B Details of benefits from other pension schemes

NB If you've been given a **Transitional tax-free amount certificate** in respect of lump sums you have taken, please send us a copy. If that is the case, you don't need to complete any section of Part B of this form – please go to Part C.

Please provide details of all other benefits that will have been paid to you at the date you complete this form. This includes income drawdown arrangement benefits already designated or due to be designated, on or before the date you complete this form.

If you don't have this information, you should obtain it from the administrator / provider of the pension arrangement in question. If you're not sure of their contact details, you can contact the Pension Tracing Service by either:

- calling them on 0800 731 0193
- or completing an online tracing form at www.gov.uk/find-pension-contact-details

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

- Any entitlement you have to a spouse or dependant's pension
- State pension
- Compensation paid by the PPF

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I'm in receipt of pension benefits that commenced **YES** Please provide details below.
on or before 5 April 2006:

NO Go to **PART B2**

Under the pensions tax legislation, we need to know about any pensions you started receiving on or before 5 April 2006. Please list these below. We need to know the annual amount for each of these pensions at the date you first started being paid from another pension arrangement (including PPF compensation) on or after 6 April 2006

Date of first benefit taken on or after 6 April 2006:

Annual Gross Rate of Pension in Payment for each arrangement you started to receive on or before 5 April 2006 as at the date in the box above:

- | | | |
|---|---|----------------------|
| 1 | £ | <input type="text"/> |
| 2 | £ | <input type="text"/> |
| 3 | £ | <input type="text"/> |
| 4 | £ | <input type="text"/> |
| 5 | £ | <input type="text"/> |

If a pre-April 2006 pension is being paid as part of an income drawdown arrangement (where income is taken directly from the pension pot while leaving the rest invested), please tick this box:

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PART B2 Benefits which were taken on or after 6 April 2006

YES / NO

- | | | |
|---|--------------------------|--------------------------|
| 1. I'm receiving a pension that commenced on or after 6 April 2006, and/or I've been paid a lump sum on or after 6 April 2006 | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. I've designated funds for income drawdown on or after 6 April 2006 | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. I've transferred benefits to a qualifying recognised overseas pension scheme on or after 6 April 2006 | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. I'm over age 75 and when I reached that age, I had benefits which I had not yet taken | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. I've been informed by a pension scheme that I've used up a further percentage of the Lifetime Allowance for any other reason | <input type="checkbox"/> | <input type="checkbox"/> |

If you answer 'yes' to any of these questions, please provide details in the relevant sections below.

If you answer 'no' to every question, please go to **PART C1**

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1. Details for each benefit commencing on or after 6 April 2006

These will have been provided to you by the administrator of the arrangement at the time that benefits were taken, and you should also receive an annual confirmation from them if you're receiving a pension. If you don't have these details, your provider will be able to help you.

For **each** benefit, please provide details below. If you've taken benefits at different times from the same arrangement, please show them on a separate benefit line.

Pensions and Lump Sums

Name of arrangement	If taken before 6 April 2004 only		Amount of tax-free cash received	Please tick if due to serious ill health	Date benefit was taken
	Percentage of Lifetime Allowance represented by benefits (to 2 decimal places)				
Benefit 1 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Benefit 2 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Benefit 3 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Benefit 4 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Benefit 5 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="checkbox"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	

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2. Details of any Funds Designated for Income Drawdown on or after 6 April 2006

These will have been provided to you by the pension provider at the time that funds were designated for drawdown. The amount designated may not be the same as the amount you would have been paid. If you don't have these details, your provider will be able to help you.

For each **designation**, please provide details below.

If taken before

6 April 2024 only

Name of arrangement	Percentage of Lifetime Allowance represented by benefits (to 2 decimal places)	Amount of tax-free cash received	Date funds were designated for drawdown
Benefit 1 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 2 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 3 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 4 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 5 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	

3. Transfers to Qualifying Registered Overseas Pension Schemes
If taken before 6 April 2024 only

Name of transferring arrangement	Percentage of Lifetime Allowance represented by benefits (to 2 decimal places)	Amount of transfer value paid	Date of transfer
Benefit 1 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 2 <input type="text"/>	<input type="text"/> . <input type="text"/> %	£ <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

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4. Benefits not taken by age 75

Name of arrangement	Percentage of Lifetime Allowance represented by benefits (to 2 decimal places)
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Benefit 1

%

5. Other changes to the percentage of the Lifetime Allowance

If taken before 6 April 2024 only

Name of arrangement	Percentage of additional Lifetime Allowance represented by benefits (to 2 decimal places)	Reason for change	Effective Date
Benefit 1	<input type="text"/> . <input type="text"/> %		<input type="text"/> / <input type="text"/> / <input type="text"/>
Benefit 2	<input type="text"/> . <input type="text"/> %		<input type="text"/> / <input type="text"/> / <input type="text"/>

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PART C1 Enhancement of Allowances

I'm in receipt of a protection
certificate provided by His
Majesty's Revenue and
Customs (HMRC) *

YES

Please provide details in **PART C2** and **PART C3**
and send us a copy of the HMRC Registration
Certificate(s)**

NO

Go to **PART D**

Please provide us with the information requested below regarding your protection. The information can be found on the certificate issued to you by HMRC.

*We don't need information about "dormant" protection.

** Please don't send original certificates as we won't be able to return them to you

Please note that, although the Lifetime Allowance (LTA) is no longer applicable, some calculations regarding the Lump Sum Allowance rely on amounts under the former LTA arrangements.

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PART C2 Protection

I hold or have held Enhanced Protection: **YES** Protected cash at 5 April 2006: £

If this protection has been lost, the date it was lost:

/ /

NO

AND / OR

I hold Primary Protection: **YES** Primary Protection Factor of: .

Protected Cash at 5 April 2006: £

NO

AND / OR

I hold Individual Protection 2014: **YES** Protected Lifetime Allowance: £ _____

NO

AND / OR

I hold Individual Protection 2016: **YES** Protected Lifetime Allowance: £ _____

NO

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AND / OR

I hold or have held Fixed Protection:	YES <input type="checkbox"/>	Protected Lifetime Allowance of £1.8m
		If this protection has been lost, the date it was lost: <input type="text"/> / <input type="text"/> / <input type="text"/>
	NO <input type="checkbox"/>	

AND / OR

I hold or have held Fixed Protection 2014:	YES <input type="checkbox"/>	Protected Lifetime Allowance of £1.5m
		If this protection has been lost, the date it was lost: <input type="text"/> / <input type="text"/> / <input type="text"/>
	NO <input type="checkbox"/>	

AND / OR

I hold or have held Fixed Protection 2016:	YES <input type="checkbox"/>	Protected Lifetime Allowance of £1.25m
		If this protection has been lost, the date it was lost: <input type="text"/> / <input type="text"/> / <input type="text"/>
	NO <input type="checkbox"/>	

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Please Note:

- If you've registered for both Enhanced and Primary Protection, then please include details of both.
- If you have any queries about protection of enhanced lump sum or lump sum and death benefit allowances, please speak to your financial adviser or visit www.hmrc.gov.uk

PART C3 Additional Allowance Enhancement Factors

I hold an enhanced lump sum allowance and/or enhanced lump sum and death benefit allowance:

YES

Please provide details below.

(This doesn't include an enhanced lifetime allowance factor gained under Primary Protection)

NO

Go to **PART D**.

Details for Additional Allowance Enhancement Factors

Allowance Enhancement Factor to 2 decimal places

Pension Credit Factor

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Pre-Commencement Pension Credit Factor

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Non-residence Enhancement Factor

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Overseas Transfer Factor

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PART D Member Declaration

I confirm that the information I've provided 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'll be wholly and personally liable for the tax charge due and any resultant penalty, as may be imposed by HMRC.

Signature: _____

Date: _____

Name: _____

For information about how we handle information provided by our members in compliance with the applicable data protection legislation, please refer to our privacy policy, which is available at:

<https://www.ppfmembers.org.uk/en/PrivacyPolicy>