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## Annual Allowance - Scheme Pays Quote Request

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If you want to use Scheme Pays you must confirm this by 31 July following the year the Annual Allowance charge becomes due (eg. if a charge is due for the 2015 / 16 tax year you need to apply for Scheme Pays by 31 July 2017).

Please note that if you do want to use Scheme Pays and intend to leave service, taking all of your benefits from the pension scheme, the Scheme Pays action must be completed before your scheme benefits can be paid.

For more information about the Annual Allowance, Scheme Pays, calculating and paying any tax charge, a calculator and Frequently Asked Questions, please see the HM Revenue & Customs website: [www.hmrc.gov.uk](http://www.hmrc.gov.uk)

Please complete and return this form to the pension scheme administrator:  
[Schemepays@MyCSP.co.uk](mailto:Schemepays@MyCSP.co.uk)



**Remember to:**

- use CAPITAL LETTERS
- include your National Insurance (NI) number
- check the HM Revenue & Customs website for guidance

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### Your personal details

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Full name	<input type="text"/>
Current address and postcode	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
National Insurance number	<input type="text"/>

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## Your Scheme Pays information

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Using your answers we'll check your eligibility for Scheme Pays. If you are eligible we'll provide you with a quote showing the permanent effect Scheme Pays will have on your Civil Service pension benefits:

The year you exceeded the Annual Allowance and a tax charge is payable (eg 2015 / 16)	<input type="text"/>
The total Annual Allowance tax charge from all your pension arrangements	<input type="text"/>
Annual Allowance tax charge in respect of your Civil Service pension benefits and (if applicable) Civil Service AVC benefits only	<input type="text"/>
Please tick if you have Civil Service AVC benefits	<input type="checkbox"/>

**Please note:** The minimum tax charge to use Scheme Pays is **£2,000**

The Annual Allowance tax charge is not shown on your Pension Saving Statement. You will need to make a separate quote request each year you exceed the Annual Allowance.

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**Your declaration** - Please tick the boxes to confirm the following:

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I understand it is my responsibility to read the guidance on the HM Revenue & Customs website in relation to Scheme Pays	<input type="checkbox"/>
I understand that if I choose not to proceed with Scheme Pays, I must make other arrangements with HM Revenue & Customs to pay the Annual Allowance tax charge	<input type="checkbox"/>
The Annual Allowance Tax charge shown above has been calculated in accordance with HMRC guidance	<input type="checkbox"/>
If I accept the Scheme Pays quote I cannot withdraw from the arrangement	<input type="checkbox"/>

Full name	<input type="text"/>
Date	<input type="text"/>

Tax is your individual responsibility. If you are liable to pay any Annual Allowance tax charge, you should follow HM Revenue & Customs guidelines for calculating, declaring and paying any tax due. Information on how to calculate whether there is any tax to pay is available at [www.hmrc.gov.uk/pensionschemes/calc-aa.htm](http://www.hmrc.gov.uk/pensionschemes/calc-aa.htm)

Please return the completed form to: [Schemepays@MyCSP.co.uk](mailto:Schemepays@MyCSP.co.uk)