



# Lifetime Allowance Tax Support

## Who could benefit from an LTA tax support session?

If you decide to arrange a tax support session, any member who has received a letter regarding their Lifetime Allowance (LTA) would benefit.

## What's it about?

The session is run by a financial consultant and will give members all the information they need around LTA and their options. Members will learn about pension taxation, Lifetime Allowance and how to check their pension details.

## How will it benefit a member?

- They'll have the opportunity to review their pension with a pension consultant to consider any potential tax charge
- They'll understand their options and what steps they need to take
- There will be the opportunity to ask any questions they have about their pension
- They can pick a time and date that is convenient.

## How do I book?

To book multiple one-to-one sessions please email [taxsupport@mycsp.co.uk](mailto:taxsupport@mycsp.co.uk) or call the tax support training line on **020 3048 1992**.

To book an individual onto a one-to-one tax session, visit the Training Services page on the MyCSP website: [www.mycsp.co.uk](http://www.mycsp.co.uk)

## How will the sessions be delivered in 2023?

One to one sessions will be delivered virtually using Microsoft Teams. If the delegate would prefer a telephone call, this can also be arranged.

Type of booking	Cost
Full day of one-to-one sessions (up to six sessions)	£4,995 + VAT
Virtual one-to-one	£895 + VAT