

## Annual Allowance - Scheme Pays quote request

### Scheme Pays

There are two types of Scheme Pays: Mandatory and Voluntary.

You can use Mandatory Scheme Pays if:

- your tax charge is over £2,000; and
- your tax charge has resulted from an increase in benefits from a single Civil Service Pension Scheme; and
- your Scheme Pays deduction is applied to the benefits within that Scheme.

You can use Voluntary Scheme Pays if:

- you do not meet the Mandatory Scheme Pays criteria but you still wish to pay your tax charge by Scheme Pays.

### Applying for Scheme Pays

You will need to advise HM Revenue & Customs (HMRC) if you plan to use Scheme Pays. The process for applying for Scheme Pays is shown below.

Please note: in accordance with the The Registered Pension Schemes Regulations (2011), once we have received your acceptance form, you cannot withdraw it.

Action	Deadline date
Members request a Scheme Pays quote using this form	<b>By 10 November 2017</b>
We will issue a Scheme Pays quote to you	<b>By 30 November 2017</b>
Members return Scheme Pays form accepting the quote	<b>By 15 December 2017</b>
We will process Scheme Pays deductions	<b>By 29 December 2017</b>
Members notify HMRC of a tax charge and their intention to pay it via Scheme Pays	<b>By 31 January 2018</b>
The pension scheme pays the tax charge by Voluntary Scheme Pays	<b>By 31 January 2018</b>
The pension scheme pays the tax charge by Mandatory Scheme Pays	<b>By 14 February 2019</b>

Tax is your 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 complete and return this form to us using this email address:  
[schemepays@MyCSP.co.uk](mailto:schemepays@MyCSP.co.uk)

**When you complete this form, please remember to:**



- use CAPITAL LETTERS
- include your National Insurance (NI) number

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## Your personal details

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Your name	<input type="text"/>
Your current address and postcode	<input type="text"/> <input type="text"/> <input type="text"/>
Your telephone number	<input type="text"/>
Your email address	<input type="text"/>
Your National Insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Your Member number*	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

\* Your member number is an eight digit number which can be found on your Pension Savings Statement (PSS).

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## Your Scheme Pays information

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

In which tax year did you exceed the Annual Allowance? For example, 2016/17.	<input type="text"/>
Total Annual Allowance tax charge you wish to pay using Scheme Pays.	£ <input type="text"/>
Is your request to amend a previous Scheme Pays?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, please detail the total annual allowance tax charge you now wish to pay for the tax year to which it relates.	£ <input type="text"/>

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

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## Your declaration – Please read and confirm that you understand the following.

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Tax is your individual responsibility and we cannot complete or assist you with any tax liability calculations. We recommend that you seek independent financial advice if you are concerned about how tax may affect your pension benefits.	<input type="checkbox"/>
HM Revenue & Customs (HMRC) set the guidance for calculating the Annual Allowance.	<input type="checkbox"/>
Once we have received your acceptance form, you cannot withdraw from a Scheme Pays arrangement.	<input type="checkbox"/>

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