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Reportable Fund Movements - Overview

* indicates required information

This is a list of all the reportable fund movements included in this Event Report so far. After adding an event, you will always be able to come back to this screen and choose to add more events.

Unauthorised payments

So far, a total of 0 unauthorised payments have been entered relating to 0 members.

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Event Number 1

Lump sum payments in respect of a member after the member died after reaching age 75 and has not been reported as an unauthorised payment or it is not in respect of a life cover lump sum

So far, a total of 0 payment(s) have been entered relating to 0 member(s).

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Event Number 17

Lump sum death benefit payment to a person in respect of the death of a member, and that payment, either alone or when aggregated with other such payments from the scheme amounts to more than 50% of the Standard Lifetime Allowance applicable when the member died

So far, a total of 0 payments over 50% of Standard Lifetime Allowance have been entered relating to 0 members.

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Event Number 2

Ill-health pension has ceased to be paid

So far, a total of 0 cessation of ill health pension payments has been entered relating to 0 member.

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Event Number 5

Benefit crystallisation event occurred relating to a member and the amount crystallised exceeds the Standard Lifetime Allowance or together with other amounts crystallised exceeds the Standard Lifetime Allowance and the member relied on either an enhanced lifetime allowance or enhanced protection to reduce or eliminate liability to the lifetime allowance charge.

So far, a total of 0 of these event(s) have been entered relating to 0 member(s).

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Event Number 6

Recognised transfers to a qualifying recognised overseas scheme that is not a registered pension scheme

So far, a total of 0 transfers to overseas scheme(s) have been entered relating to 0 member.

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Event Number 9

Sums or assets in respect of at least one member of the pension scheme meet Condition A or Condition B in paragraph 11 of Schedule 28 Finance Act 2004 for the first time during the reporting year.

So far, a total of 1 member(s) have met one of the above conditions for the first time.

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Event Number 15

Sums or assets in respect of at least one dependant of a deceased member of the pension scheme meets Condition A or Condition B in paragraph 25 of Schedule 28 Finance Act 2004 for the first time during the reporting year.

So far, a total of 0 member(s) have met one of the above conditions for the first time.

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The scheme provided benefits to a member who is under the normal minimum pension age and before the benefits were provided the member was either in the year that they were provided or any of the preceding six years -

a) in relation to the sponsoring employer or an associated employer a director or a person connected to a director;

b) whether alone or with others the sponsoring employer, or

c) a person connected to the sponsoring employer,

and the provision of these benefits has not been reported as an unauthorised payment or as a serious ill-health lump sum and it is not a winding up lump sum

So far, a total of 0 benefit details have been entered relating to 0 members.

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Event Number 3

Payment to a member of a serious ill-health lump sum and before the payment was made the member was either in the year that they were provided or any of the preceding six years -

a) in relation to the sponsoring employer or an associated employer a director or a person connected to a director;

b) whether alone or with others the sponsoring employer, or

c) a person connected with the sponsoring employer

So far, a total of 0 payments have been entered relating to 0 members.

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Event Number 4

Pension commencement lump sums of more than 7.5% but less than 25% of the Standard Lifetime Allowance but more than 25% of a members pension rights paid

So far, a total of 0 payments have been entered relating to 0 members.

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Event Numbers 7 & 8A

The scheme made a pension commencement lump sum payment to a member who relied on an enhanced lifetime allowance or enhanced protection

So far, a total of 0 payments have been entered relating to 0 members.

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Event Numbers 8 & 8A

The scheme is treated as having made a scheme chargeable payment - income from taxable property

So far, you have indicated that there **has not been** income from taxable property

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Event Number 18

The scheme is treated as having made a scheme chargeable payment - gains from taxable property

So far, you have indicated that there **has not been** gains from taxable property

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The scheme is treated as having made a scheme chargeable payment - failure to make a minimum level of payment from an alternatively secured pension fund or a dependant's alternatively secured pension fund in an alternatively secured year

So far, you have indicated that there **has not been** failure to make a minimum payment from an alternatively secured pension fund

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