

Use this form to authorise HM Revenue & Customs to allow the Scheme Administrator(s) to view the Lifetime Allowance Certificate(s) specified.

1 Member's details

1.1 Member's name

Title

First name(s)

Surname

1.2 Member's address

Postcode
Country

1.3 National Insurance number *if known*

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1.4 Unique Taxpayer Reference (UTR) *if known*

1.5 Date of birth

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2 Enter below the reference numbers of all the certificates you want us to make available to view. Use Q3 to specify which of these certificates you want the Scheme Administrator(s) to view.

2.1 Certificate reference numbers

2.1A

2.1B

2.1C

3 Scheme Administrator's details

Enter below the Scheme Administrator(s) details and which of the Lifetime Allowance Certificates listed at Q2.1 you want us to allow them to view.

3.1 Scheme Administrator ID

A

3.2 Is the Scheme Administrator:

an individual? *Go to Q3.3*

an organisation? *Go to Q3.4*

3.3 Individual name

Title

First name(s)

Surname

3.4 Organisation name

3.5 Please select which certificate(s) shown at Q2.1 the Scheme Administrator named above is allowed to view

2.1A

2.1B

2.1C

If you wish to authorise more than one Scheme Administrator to view your Certificates, go to Qs3.6 to 3.15, if necessary.

If you do not wish to authorise any more Scheme Administrators to view your certificates, go to Q4.

3.6 Scheme Administrator ID

A

3.7 Is the Scheme Administrator:

an individual? *Go to Q3.8*

an organisation? *Go to Q3.9*

3.8 Individual name

Title

First name(s)

Surname

3.9 Organisation name

3.10 Please select which certificate(s) shown at Q2.1 the Scheme Administrator named above is allowed to view

2.1A

2.1B

2.1C

If you do not wish to authorise any more Scheme Administrators to view your certificates, go to Q4.

3.11 Scheme Administrator ID

A

3.12 Is the Scheme Administrator:

an individual? *Go to Q3.13*

an organisation? *Go to Q3.14*

3.13 Individual name

Title

First name(s)

Surname

3.14 Organisation name

3.15 Please select which certificate(s) shown at Q2.1 the Scheme Administrator named above is allowed to view

2.1A

2.1B

2.1C

4 Declaration

I authorise HM Revenue & Customs to allow the Scheme Administrator(s) named on this form to view the Lifetime Allowance Certificates shown on this form.

Member's signature

Date

/ /

Return this form to:

*HM Revenue & Customs
Audit & Pension Schemes Services
Yorke House
Castle Meadow Road
Nottingham
NG2 1BG*