



This form may be used to amend information declared on the original Pension Scheme Return. Alternatively, you can amend the Pension Scheme Return online. Go to www.hmrc.gov.uk and under do it online select Pension Schemes.

About the pension scheme

<p>1 This return is for the year to 5 April YYYY:</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>From</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>2 Scheme information</p>	<p>To</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>2.1 Pension Scheme Tax Reference (PSTR)</p> <p><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"/> R <input type="text"/></p>	<p>From</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>2.2 Pension scheme name</p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>	<p>To</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>3 Has the return been completed for either:</p> <p>a) a period other than the 12 months ending on 5 April? or</p> <p>b) if the scheme was newly registered during the period covered by this return, for a period other than the period from the date of registration to 5 April?</p> <p>Yes <input type="checkbox"/> If Yes, go to box 3.1</p> <p>No <input type="checkbox"/> If No, go to box 4</p>	<p>From</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>3.1 How many accounting periods are covered by this return?</p> <p><input type="text"/> <input type="text"/></p>	<p>To</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>
<p>3.2 Accounting period(s) DD MM YYYY</p> <p>From</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>To</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>From</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>To</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p>	<p>4 During the period covered by this return was the aggregate of payments to and from the scheme greater than £100,000?</p> <p>Yes <input type="checkbox"/> If Yes, go to box 4.1</p> <p>No <input type="checkbox"/></p> <p>If No, please enter the amount below then go to box 5</p> <p>£ <input type="text"/></p>
	<p>4.1 Total amount of the pension contributions received</p> <p>£ <input type="text"/></p>
	<p>4.2 Total amount of transfer-in payments</p> <p>£ <input type="text"/></p>
	<p>4.3 Total amount of transfer-out payments</p> <p>£ <input type="text"/></p>
	<p>4.4 Total amount paid out in lump sums and lump sum death benefits</p> <p>£ <input type="text"/></p>

4.5 Total amount paid out to purchase lifetime annuities and scheme pensions from an insurance company

£

4.6 Total amount borrowed

£

4.7 Other

Give a brief description *max 150 characters*

Amount

£

5 At the end of the period covered by this return, did the scheme have assets with a total value before pension liabilities greater than £400,000?

Yes No

If No, please state the amount

£

6 At any time during the period covered by this return, did the scheme, either directly or indirectly, own assets that it had acquired from either:

- a sponsoring employer or any person connected with that employer, or
- a person who was a director of or a person who is connected to a director of a close company that is also a sponsoring employer, or
- a person who was either a sole owner or partner or a person connected with the sole owner or partner of a business which was a sponsoring employer, or
- a member or person connected with a member?

Yes No

If No, and you answered No at box 4 and box 5, *go to Declaration.*

If No, and you answered Yes at box 4 or box 5, *go to box 11.*

If Yes, *go to box 7.*

7 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any shares in the sponsoring employer if it was a company?

Yes If Yes, *go to box 7.1*

No If No, *go to box 8*

7.1 Total number of shares held at the end of the period

7.2 Total cost or market value of the shares held at the end of the period

£

Say whether this amount is:

Market value

Cost

7.3 Total number of shares purchased or subscribed for

7.4 Total cost of the shares purchased or subscribed for

£

7.5 Total number of shares sold, or otherwise disposed of

7.6 Total amount of any consideration received from the sale or disposal of the shares in the sponsoring employer country

£

7.7 Were any disposals made to a connected party or connected parties?

Yes No

7.8 Total amount of any dividends or other receipts

£

7.9 The name and Company Registration Number (CRN) of the company or companies to which the shares relate(d)

Name

CRN

Name

CRN

Name

CRN

Name

CRN

If you need to provide details for additional companies, please use a separate sheet.

8 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any land or interest in land that it had acquired from a connected party or connected parties?

Yes If Yes, go to box 8.1

No If No, go to box 9

8.1 Total cost or market value of any land or interest in land owned by the scheme at the end of the period

Say whether this amount is:

Market value

Cost

8.2 Total cost of any land or interest in land, or premium paid to acquire a leasehold interest in land

8.3 Total sale proceeds of any land sold, or interest in land sold, or premiums on disposal of a leasehold interest in land

8.4 If any land or interest in land was disposed of without any consideration, state the total cost or market value

State whether this amount is:

Market value

Cost

8.5 Were any disposals made to a connected party or connected parties?

Yes No

8.6 Total amount of income received from land or interest in land

8.7 Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes No

9 At any time during the period covered by this return, were any amounts outstanding from loans made to a connected party or connected parties?

Yes If Yes, go to box 9.1

No If No, go to box 10

9.1 Total amount outstanding at the end of the period

9.2 Total amount of any loans made

9.3 Total amount of any loans repaid

9.4 Total amount of interest received

10 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any assets acquired from a connected party, other than shares in the sponsoring employer if it was a company, land, interest in land or loans?

Yes If Yes, go to box 10.1

No If No, go to box 11

10.1 Total cost or market value of any assets at the end of the period

£

Say whether this amount is:

Market value

Cost

10.2 Nature of any assets acquired during the period of this return

Forms of transport other than private motor vehicles

Plant and machinery

Fixtures and fittings

Quoted shares

Unquoted shares

Tangible moveable property

Insurance company investments

Other

If other, give brief description *max 150 characters*

10.3 Total cost of assets acquired

£

10.4 Did you dispose of any assets acquired?

Yes If Yes, go to box 10.5

No If No, go to box 10.8

10.5 Nature of any assets disposed of

Forms of transport other than private motor vehicles

Plant and machinery

Fixtures and fittings

Quoted shares

Unquoted shares

Tangible moveable property

Insurance company investments

Other

If other, give brief description *max 150 characters*

10.6 Total consideration received from the disposal of assets

£

10.7 Were any disposals made to a connected party or connected parties?

Yes No

10.8 Total amount of income received from assets

£

11 At any time during the period covered by this return, was there any cash, cash on deposit or were there any current account balances held by the scheme?

Yes If Yes, go to box 11.1

No If No, go to box 12

11.1 Total amount of all cash and bank balances at the beginning of the period

£

11.2 Total amount of all cash and bank balances at the end of the period

£

11.3 Total amount of interest credited to these accounts

£

12 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any assets acquired at arm's length?

Yes If Yes, go to box 12.1

No If No, go to Declaration

12.1 Total cost or market value of any assets owned at the end of the period

£

Say whether this amount is:

Market value

Cost

12.2 Nature of any assets acquired during the period of this return

Quoted shares

Unquoted shares

Land or interest in land

– Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes No

Loans

Forms of transport other than private motor vehicles

Plant and machinery

Fixtures and fittings

Tangible moveable property

Insurance company investments

Other

If other, give brief description *max 150 characters*

12.3 Total cost of any assets acquired

£

12.4 Did you dispose of any assets acquired at arm's length?

Yes If Yes, go to box 12.5

No If No, go to box 12.8

12.5 Nature of any assets disposed of

Quoted shares

Unquoted shares

Land or interest in land

– Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes No

Loans

Forms of transport other than private motor vehicles

Plant and machinery

Fixtures and fittings

Tangible moveable property

Insurance company investments

Other

If other, give brief description *max 150 characters*

12.6 Total consideration received from the disposal of any assets

12.7 Were any disposals made to a connected party or connected parties?

Yes No

12.8 Total amount of income from assets received

£

Declaration

<p>13 This declaration must be completed and signed by the Scheme Administrator before sending the amendment to the Registered Pension Scheme Return.</p> <p>I declare that:</p> <ul style="list-style-type: none">to the best of my knowledge and belief, the information given in this amendment to the return is correct and complete <input type="checkbox"/>I understand that if I have made a false statement on this amendment to the return I may be liable to a penalty, and that false statements may also lead to prosecution. <input type="checkbox"/>	<p>Signature</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div> <p>Date <i>DD MM YYYY</i></p> <table border="1"><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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About the Scheme Administrator

<p>14 Scheme Administrator's details</p> <p>14.1 Full name of the Scheme Administrator, <i>if a company or organisation</i></p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div> <p>14.2 Full name of the Scheme Administrator, <i>if individual</i> Title – <i>enter MR, MRS, MISS, MS or other title</i></p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>First name(s)</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Surname</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>14.3 Scheme Administrator's ID</p> <table border="1"><tr><td>A</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr></table>	A	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<p>14.4 Scheme Administrator's address</p> <table border="1"><tr><td><input type="text"/></td></tr><tr><td><input type="text"/></td></tr><tr><td><input type="text"/></td></tr><tr><td><input type="text"/></td></tr><tr><td>Postcode</td></tr><tr><td><input type="text"/></td></tr><tr><td>Country</td></tr><tr><td><input type="text"/></td></tr></table> <p>14.5 Scheme Administrator's email</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>14.6 Scheme Administrator's phone number</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Postcode	<input type="text"/>	Country	<input type="text"/>
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