

Use this form to apply for the issue of an Appropriate Personal Pension (APP) Stakeholder Pension scheme certificate.

Please write in CAPITALS, using blue or black ink

1 Existing scheme details

Is this application about an existing Appropriate Personal Pension (APP) scheme?

No ▶ go to section 2

Yes Name of existing APP scheme

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Existing Appropriate Scheme Number (ASCN)

A	
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▶ go to section 2

2 Stakeholder Pension scheme details

Name of scheme

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Does the scheme have tax approval?

Yes Tax approval reference number

S F				
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No Please tick the box to confirm that tax approval for the scheme is currently being sought

Required effective date

06	/	04	/	
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Type of institution *tick one only*

- Bank
- Building society
- Insurance company
- Friendly Society
- Unit trust
- Pension company

Nature of scheme *tick one only*

- An arrangement for the issue of insurance or annuity contracts
- A unit trust scheme
- An arrangement for the investment of contributions in shares or on deposit with a building society
- An arrangement for the investment of contributions in an interest bearing account with an institution authorised under Part 1 of the Banking Act 1987

Scheme correspondence address

To be used by the Inland Revenue National Insurance Contributions Office eg for the issue of pension statements.

Name
Address
Postcode

Office use only	<input type="checkbox"/> REJ	<input type="checkbox"/> ACC	<input type="checkbox"/> APP
Ref No	S F		

3 Details for National Insurance rebate payments

Name and address of bank/building society

Name
Address
Postcode

Account details

Branch sort code																				
Account number																				
Account name																				

Building society reference number *if applicable*
18 characters max

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Account name used by BACS 18 characters max

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Magnetic media number

Do you hold an existing magnetic media number?

- No
- Yes *provide details below, if you wish to use it for your SHP scheme*

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Do you wish to apply for a new or additional magnetic media number?

- Yes
- No

Name and address for payments information

Full name
Address
Postcode

4 Declaration

I confirm that:

- the scheme is covered by the relevant statutory arrangement for compensating individual scheme members for the loss of any part of their protected rights in the event of insolvency
- the scheme has been established in such a way that an enforceable right exists for any third party who becomes entitled to payment which gives effect to protected rights
- the scheme meets all of the requirements of the Personal Pension Schemes (Appropriate Schemes) Regulations 1997 SI 1997/470 and/or the Personal Pension Schemes (Appropriate Schemes) Regulations (Northern Ireland) 1997 SR 1997 No. 139
- the scheme takes the form mentioned in section 2 of this form
- I have accurately completed section 3 of this form to register the scheme for the payment of contracted-out age-related rebates
- tax approval has been granted or is currently being sought in respect of the scheme under the provisions of Chapter IV of Part XIV of the Income and Corporation Taxes Act 1988, by filling in an *Application for tax approval of a scheme*, form SHP101.

I apply to the Inland Revenue Savings, Pensions, Share Schemes (Nottingham) on behalf of the scheme:

- for an Appropriate Personal Pension Stakeholder Pension scheme certificate effective from the required date shown in section 2.

Signature of a trustee or the Scheme Administrator

Signature	Date
	/ /
Name	
Status	

Address of trustee or Scheme Administrator

Address
Postcode

5 What to do now

When you have filled in this form, send it with any relevant IR SPSS (Nottingham) forms to:

Inland Revenue Savings, Pensions, Share Schemes (Nottingham)
Yorke House
PO Box 62
Castle Meadow Road
Nottingham
NG2 1BG