

Calculate your public service pension adjustment

Case Number : submissionReference

Related references

AA Compensation	submissionReference
AA Compensation Amendment	Not applicable
AA Mini-Regime	Not applicable
AA Mini-Regime Amendment	Not applicable
LTA	Not applicable

Administrative details

First name	FirstName
Surname	Surname
Date of birth	13/01/1920
Address line 1	testLine1
Address line 2	testLine2
Postcode	Postcode
Country	Not applicable
Unique Taxpayer Reference (UTR)	Not applicable

National Insurance number or alternative identifier (TRN)	someNino
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Contact number

Details of member you have lasting power of attorney or deputyship

First name	FirstName
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Surname	Surname
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Date of birth	13/01/1920
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Address line 1	Behalf Address 1
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Address line 2	Behalf Address 2
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Postcode	Postcode
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Country	Not applicable
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Unique Taxpayer Reference (UTR)	someUTR
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National Insurance number or alternative identifier (TRN)	someNino
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Lifetime Allowance

Have you had a benefit crystallisation event in your pension?	todo
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What was the date of the benefit crystallisation event?	todo
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Have you been told about a change in the lifetime allowance percentage?	todo
Has the change resulted in a new, increased or decreased lifetime allowance charge?	todo
Do you have lifetime allowance protection or enhancements?	todo
What is your protection type?	todo
What is your protection reference?	todo
Has your protection type or enhancement changed?	todo
What is the new protection type or enhancement?	todo
What is the reference of the new protection type or reference?	todo
Have you had a lifetime allowance charge from 6 April 2015 to 5 April 2023?	todo
How was the excess above your lifetime allowance paid to you?	todo
How much was your lifetime allowance charge?	todo
Who paid your lifetime allowance charge?	todo
What is the name of the pension scheme that paid your lifetime allowance charge	todo

What is the tax reference for the pension scheme that paid?	todo
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What is the value of the new lifetime allowance charge?	todo
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Who is paying the extra lifetime allowance charge?	todo
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What is the name of the scheme that is paying the extra charge?	todo
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What is the tax reference of the scheme that is paying the extra charge?	todo
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Public sector pension scheme details

Name of pension scheme	TestScheme
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PSTR	TestPSTR
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Members individual pension scheme reference	reformReference
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Compensation

Amount of direct compensation 16/17	100
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Amount of indirect compensation 16/17	200
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Revised tax charge total 16/17	270
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How much of the charge did you pay?	50
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How much of the charge did your pension scheme pay?	75
Name of scheme originally paid charge 16/17	Scheme A
PSTR of scheme originally paid charge 16/17	PSTR123

Tax administration framework

Value of previous charge for 16/17	todo
Who was the previous charge paid by?	todo
Name of scheme	todo
PSTR	todo
Credit value for 16/17	50
Debit value for 16/17	25
Is the scheme paying the charge?	todo
Date of election made to the scheme	todo
Value scheme is paying	todo
PSTR of scheme paying	todo
Name of scheme paying	todo

Are you claiming for higher or additional rate tax relief?

Amount	1000
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Name of scheme paying	SchemeA
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PSTR of scheme paying	schemePstr
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Payment information

Name on bank account	TestAccountName
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Sort code	TestSortCode
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Account number	TestAccountNumber
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Declarations

Declaration for compensation	Y
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Declaration for tax administration framework	Y
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Declaration for address	Y
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Declaration for contact details	Y
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Declaration for true and complete	Y
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Declaration if claiming on behalf of a deceased individual	N
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Declaration if claiming on behalf of a member for whom you have a lasting power of attorney or deputyship	N
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Submitted

11 August 2023 - 14:15
