

# Calculate your public service pension adjustment

**Case Number : submissionReference**

## Related references

|                 |                     |
|-----------------|---------------------|
| AA Compensation | submissionReference |
|-----------------|---------------------|

|                           |                |
|---------------------------|----------------|
| AA Compensation Amendment | Not Applicable |
|---------------------------|----------------|

|                              |                |
|------------------------------|----------------|
| Tax Administration Framework | Not Applicable |
|------------------------------|----------------|

|                                        |                |
|----------------------------------------|----------------|
| Tax Administration Framework 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 |
|----------------|-----------|

|           |          |
|-----------|----------|
| Town/City | TestCity |
|-----------|----------|

|        |            |
|--------|------------|
| County | TestCounty |
|--------|------------|

|          |          |
|----------|----------|
| Postcode | Postcode |
|----------|----------|

|         |                |
|---------|----------------|
| Country | United Kingdom |
|---------|----------------|

|                                 |         |
|---------------------------------|---------|
| Unique Taxpayer Reference (UTR) | someUtr |
|---------------------------------|---------|

|                           |          |
|---------------------------|----------|
| National Insurance number | someNino |
|---------------------------|----------|

|                |            |
|----------------|------------|
| Contact number | 1234567890 |
|----------------|------------|

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## Details of member you have lasting power of attorney or deputyship

|            |           |
|------------|-----------|
| First name | FirstName |
|------------|-----------|

|         |         |
|---------|---------|
| Surname | Surname |
|---------|---------|

|               |            |
|---------------|------------|
| Date of birth | 13/01/1920 |
|---------------|------------|

|                |                  |
|----------------|------------------|
| Address line 1 | Behalf Address 1 |
|----------------|------------------|

|                |                  |
|----------------|------------------|
| Address line 2 | Behalf Address 2 |
|----------------|------------------|

|           |      |
|-----------|------|
| Town/City | City |
|-----------|------|

|        |        |
|--------|--------|
| County | County |
|--------|--------|

|          |          |
|----------|----------|
| Postcode | Postcode |
|----------|----------|

|         |                |
|---------|----------------|
| Country | United Kingdom |
|---------|----------------|

|                                 |         |
|---------------------------------|---------|
| Unique Taxpayer Reference (UTR) | someUTR |
|---------------------------------|---------|

|                                                           |          |
|-----------------------------------------------------------|----------|
| National Insurance number or alternative identifier (TRN) | someNino |
|-----------------------------------------------------------|----------|

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## Public sector pension scheme details

|                                                           |                 |
|-----------------------------------------------------------|-----------------|
| <b>Name of pension scheme</b>                             | TestScheme      |
| <b>PSTR</b>                                               | TestPSTR        |
| <b>Members reform individual pension scheme reference</b> | reformReference |
| <b>Members legacy individual pension scheme reference</b> | legacyReference |

## Compensation

|                                                            |                |
|------------------------------------------------------------|----------------|
| <b>Amount of direct compensation 16/17</b>                 | £100           |
| <b>Amount of indirect compensation 16/17</b>               | £200           |
| <b>Revised tax charge total 16/17</b>                      | £270           |
| <b>How much of the charge did you pay?</b>                 | £50            |
| <b>Scheme</b>                                              | 1              |
| <b>How much of the charge did your pension scheme pay?</b> | £100           |
| <b>Name of scheme originally paid charge 16/17</b>         | TestName2017   |
| <b>PSTR of scheme originally paid charge 16/17</b>         | TestTaxRef2017 |
| <b>Scheme</b>                                              | 2              |

|                                                            |                 |
|------------------------------------------------------------|-----------------|
| <b>How much of the charge did your pension scheme pay?</b> | £100            |
| <b>Name of scheme originally paid charge 16/17</b>         | TestName2222017 |
| <b>PSTR of scheme originally paid charge 16/17</b>         | TestTaxRef      |
| <b>Amount of direct compensation 17/18</b>                 | £1002018        |
| <b>Amount of indirect compensation 17/18</b>               | £2002018        |
| <b>Revised tax charge total 17/18</b>                      | £2702018        |
| <b>How much of the charge did you pay?</b>                 | £502018         |
| <b>Scheme</b>                                              | 1               |
| <b>How much of the charge did your pension scheme pay?</b> | £100            |
| <b>Name of scheme originally paid charge 17/18</b>         | TestName2018    |
| <b>PSTR of scheme originally paid charge 17/18</b>         | TestTaxRef      |
| <b>Scheme</b>                                              | 2               |
| <b>How much of the charge did your pension scheme pay?</b> | £100            |

|                                                    |               |
|----------------------------------------------------|---------------|
| <b>Name of scheme originally paid charge 17/18</b> | TestName22018 |
|----------------------------------------------------|---------------|

|                                                    |            |
|----------------------------------------------------|------------|
| <b>PSTR of scheme originally paid charge 17/18</b> | TestTaxRef |
|----------------------------------------------------|------------|

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## Tax administration framework

|                                           |      |
|-------------------------------------------|------|
| <b>Value of previous charge for 16/17</b> | £300 |
|-------------------------------------------|------|

|                                             |      |
|---------------------------------------------|------|
| <b>Who was the previous charge paid by?</b> | Both |
|---------------------------------------------|------|

|               |   |
|---------------|---|
| <b>Scheme</b> | 1 |
|---------------|---|

|                       |              |
|-----------------------|--------------|
| <b>Name of scheme</b> | TestName2017 |
|-----------------------|--------------|

|                       |                |
|-----------------------|----------------|
| <b>PSTR of scheme</b> | TestTaxRef2017 |
|-----------------------|----------------|

|               |   |
|---------------|---|
| <b>Scheme</b> | 2 |
|---------------|---|

|                       |                 |
|-----------------------|-----------------|
| <b>Name of scheme</b> | TestName2222017 |
|-----------------------|-----------------|

|                       |            |
|-----------------------|------------|
| <b>PSTR of scheme</b> | TestTaxRef |
|-----------------------|------------|

|                               |      |
|-------------------------------|------|
| <b>Credit value for 16/17</b> | £200 |
|-------------------------------|------|

|                              |     |
|------------------------------|-----|
| <b>Debit value for 16/17</b> | £25 |
|------------------------------|-----|

|                                         |     |
|-----------------------------------------|-----|
| <b>Is the scheme paying the charge?</b> | Yes |
|-----------------------------------------|-----|

|                                            |            |
|--------------------------------------------|------------|
| <b>Date of election made to the scheme</b> | 13/01/2017 |
|--------------------------------------------|------------|

|                               |    |
|-------------------------------|----|
| <b>Value scheme is paying</b> | 10 |
|-------------------------------|----|

|                                             |                |
|---------------------------------------------|----------------|
| <b>PSTR of scheme paying</b>                | schemePstr     |
| <b>Name of scheme paying</b>                | TestSceme      |
| <b>Value of previous charge for 17/18</b>   | £1700          |
| <b>Who was the previous charge paid by?</b> | Scheme         |
| <b>Scheme</b>                               | 1              |
| <b>Name of scheme</b>                       | TestName2018   |
| <b>PSTR of scheme</b>                       | TestTaxRef     |
| <b>Scheme</b>                               | 2              |
| <b>Name of scheme</b>                       | TestName22018  |
| <b>PSTR of scheme</b>                       | TestTaxRef     |
| <b>Credit value for 17/18</b>               | £1145076       |
| <b>Debit value for 17/18</b>                | £636           |
| <b>Is the scheme paying the charge?</b>     | No             |
| <b>Date of election made to the scheme</b>  | Not Applicable |
| <b>Value scheme is paying</b>               | Not Applicable |
| <b>PSTR of scheme paying</b>                | Not Applicable |
| <b>Name of scheme paying</b>                | Not Applicable |
|                                             |                |
|                                             |                |

## Are you claiming for higher or additional rate tax relief?

|        |       |
|--------|-------|
| Amount | £1000 |
|--------|-------|

|                       |         |
|-----------------------|---------|
| Name of scheme paying | SchemeA |
|-----------------------|---------|

|                       |            |
|-----------------------|------------|
| PSTR of scheme paying | schemePstr |
|-----------------------|------------|

## Payment information

|                      |                 |
|----------------------|-----------------|
| Name on bank account | TestAccountName |
|----------------------|-----------------|

|           |              |
|-----------|--------------|
| Sort code | TestSortCode |
|-----------|--------------|

|                |                   |
|----------------|-------------------|
| Account number | TestAccountNumber |
|----------------|-------------------|

## Declarations

|                              |   |
|------------------------------|---|
| Declaration for compensation | Y |
|------------------------------|---|

|                                              |   |
|----------------------------------------------|---|
| Declaration for tax administration framework | Y |
|----------------------------------------------|---|

|                                   |   |
|-----------------------------------|---|
| Declaration for true and complete | Y |
|-----------------------------------|---|

|                                                            |   |
|------------------------------------------------------------|---|
| Declaration if claiming on behalf of a deceased individual | N |
|------------------------------------------------------------|---|

|                                                                                                           |   |
|-----------------------------------------------------------------------------------------------------------|---|
| Declaration if claiming on behalf of a member for whom you have a lasting power of attorney or deputyship | N |
|-----------------------------------------------------------------------------------------------------------|---|

|           |                        |
|-----------|------------------------|
| Submitted | 23 August 2023 - 11:07 |
|-----------|------------------------|