



CARLTON JAMES

Small Self-Administered Scheme Pension Contribution Form

Carlton James Private & Commercial Ltd

Lime Kiln House, Lime Kiln, Royal Wootton Bassett, SN4 7HF

0800 233 5626

info@carltonjames.co.uk

Before you start

The contribution form must be completed if you, your employer, or any other party want to make a single or regular contribution to your Pension Scheme. Please ensure you complete all relevant sections. The form is also required if you wish to make amendments to your existing regular contributions. If you are unsure about your options, then we recommend that you speak to a Financial Adviser.

Member details

Full Name	Mark Elton		
		National Insurance Number	
Home Address	Flat 6, Endlebury Court, 2 Endlebury Road, North Chingford, E4 6QE.		
Scheme Name	DC Pension Scheme		

Protection

Do you have any form of HMRC Protection?

If you have any form of Protection, any contributions you make to this scheme may result in the loss of your protection. Please see Financial Advice if you require any further information.

Please provide a copy of the HMRC Protection Certificate if applicable.

Pension Input Periods

The pension input period (PIP) is the period over which your contributions are tested against the Annual Allowance. We will automatically align your PIP with the tax year unless you instruct us otherwise.

If you wish to nominate a different date for your PIP please confirm here:-

Source of Funds

Please confirm (tick one) how the contribution is to be funded

From earnings	<input type="checkbox"/>	Savings	<input checked="" type="checkbox"/>
Divorce settlement	<input type="checkbox"/>	Inheritance	<input type="checkbox"/>
Winnings	<input type="checkbox"/>	Capital Gain	<input type="checkbox"/>
Gift	<input type="checkbox"/>	Other (please specify below)	<input type="checkbox"/>

Eligibility

Occupation	SENIOR PROJECT MANAGER
Approximate Annual Earnings (£)	71,000

Please confirm **ONE** of the list below:

EMPLOYED (chargeable to income tax under Chapter 2 of Part 2 on the Income Tax (Earnings and Pensions Act) 2003).	<input checked="" type="checkbox"/>
PENSIONER (chargeable to income tax under Part 9 of the Income Tax (Earnings and Pension) Act 2003).	<input type="checkbox"/>
SELF-EMPLOYED (chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Trading and Other Income) Act 2005).	<input type="checkbox"/>
CHILD (under the age of 16).	<input type="checkbox"/>
OTHER (any individual not falling into one of the categories above). (please also complete below)	<input type="checkbox"/>

If you have selected 'other' from the above list, please confirm (tick one) which of the below statements best applies to you at the relevant date:

Caring for one or more children under age 16	<input type="checkbox"/>
Caring for a person aged 16 or over	<input type="checkbox"/>
In full time education	<input type="checkbox"/>
Unemployed	<input type="checkbox"/>
Other	<input type="checkbox"/>

Personal Contributions

Complete this section if you are making a contribution to your scheme, or it is being made by a third party other than your employer. Personal and third party contributions should be paid to your SSAS gross. If you are eligible, you can obtain tax relief as part of your self-assessment tax return.

£2,000

Contribution Type:-	Single	<input checked="" type="checkbox"/>	Regular	<input type="checkbox"/>				
Frequency of regular contributions:-	N/A	<input type="checkbox"/>	Monthly	<input type="checkbox"/>	Quarterly	<input type="checkbox"/>	Annual	<input type="checkbox"/>
Start date of regular contributions:-	N/A	<input type="checkbox"/>	<input type="text"/>					

Employer Contributions

This section should be completed where your employer will be making contributions to your scheme.

Company Name

Contact Name

Company Address

Email Address

Telephone No(s).

Contribution Amount (Gross):-

Contribution Type:- Single Regular

If you have ticked regular
Please provide the frequency:- N/A Monthly Quarterly Annually

Start date of regular contributions:- N/A

Signatory Name:-

Position in Firm:-

Signature of Employer: Date:

Third Party Contribution

This section should be completed where your employer will be making contributions to your scheme.

Company Name

Contact Name

Company Address

Email Address

Telephone No(s).

Contribution Amount (Gross):-

Contribution Type:-

Single

Regular

*If you have ticked regular
Please provide the frequency:-*

N/A

Monthly

Quarterly

Annually

Start date of regular contributions:-

N/A

Signatory Name:-

Position in Firm:-

Signature of Employer:

Date:

Identification Requirements

If the Third Party is an individual we will complete an online identity check. Where it is a company please complete the below.

Company Registration No.

Please provide a copy of the Certificate of Incorporation, copy of the most recent filed audited accounts and details of current company officers (i.e details of current directors and company secretary) and shareholders

Standing Order Set Up (Please copy this page for any additional Standing Orders)

Your account details

Sort Code

Account Number

Payment details

Amount of usual payment

Frequency of payment

Date of first payment

Date of last payment (please specify if no end date)

If the bank receives your form after the first payment date selected above, please tick the following box if you are happy for the bank to make an immediate payment on your behalf to satisfy your first Standing Order payment.

Date of usual payment (if different to first payment)

Amount of first payment (if different to usual amount)

Beneficiary details (Pension Practitioner to complete)

Sort Code

Account Number

Declaration

For and on behalf of

Authorised Signatory*

Name

Name

Date

Date

*If signing on behalf of a company account this must be in accordance with the Appointment of Bankers /mandate. Otherwise, company applications need to be signed by 2 directors, a director and a company secretary, or the director in the case of a company with a sole director, LLP applications by 2 members, partnership applications by all partners, and sole trader for applications by the sole trader.

Declaration

To: the trustees and scheme administrator of the Scheme named.

I am aware of the current limits and allowances regarding tax relief. I declare that:

- The total contributions that have been or will be paid to any registered pension scheme in respect of which I am entitled to tax relief under section 188 of the Finance Act 2004 will not exceed the higher of the following:
 - The basic amount (£3,600); or
 - My "relevant UK earnings" for the tax year in question, within the meaning of section 189 of the Finance Act 2004.
- The declaration & information I have given in this application is, to the best of my knowledge and belief, correct and not misleading.
- I will give notice to Pension Practitioner in writing by the end of the tax year (5th April) or within 30 days:
 - my residency status
 - other personal information, such as a change of name or permanent residential address
 - status affecting qualification for tax relief

Members Name

Signature



Date