



HM Revenue  
& Customs

# Tax Return for Trustees of Registered Pension Schemes

Tax year 6 April 2013 to 5 April 2014

Self Assessment tax reference (as shown on the notice to file)

16287 93458.

Return to

Pension Schemes Services  
HM Revenue & Customs  
FitzRoy House  
Castle Meadow Road  
NOTTINGHAM  
NG2 1BD

Phone 0300 123 1079

Pension scheme name and correspondence address  
(please complete in full)

Pension PRACTITIONER COM  
DAWS HOUSE  
33-35 DAWS LANE  
LONDON  
NW7. 4SD

Adviser's reference

JOHN DOBBINS.

Date DD MM YYYY

05 03 2016

## Please read this page first

You are required by law to send us a tax return for the year from 6 April 2013 to 5 April 2014. **This tax return cannot be filed online.**

**When you have completed this tax return please return it to the above address.**

Please start by filling in the Self Assessment tax reference above for the registered pension scheme to which this return relates, the pension scheme name and correspondence address. If you give an adviser's address, please also include their reference for the scheme.

### If you want us to do the tax calculation

If you want us to do the tax calculation, you must file the return by the later of **31 October 2014** or **two months after** the date this Notice was given. Otherwise we may not be able to send you a statement in time for you to pay any tax which is due by the later of **31 January 2015** or **three months after** the date this Notice was given.

### Calculating the tax yourself

If you want to calculate the tax yourself, you must file the return by the later of **31 January 2015** or **three months after** the date this Notice was given. If we receive the return after that date, you will be liable to an automatic penalty of £100.

### Paying any tax the pension scheme owes

Make sure any tax you pay that the pension scheme owes reaches us by **31 January 2015** or you will have to pay interest and possibly a late payment penalty.

### Accounts prepared for a 12-month period ending in the year to 5 April 2014

If accounts have been prepared for a 12-month period ending in the year to 5 April 2014, you may if you wish fill in the tax return based on the pension schemes' income and gains during the period of those accounts.

### Accounts not prepared for a 12-month period ending in the year to 5 April 2014

If your accounts have not been prepared for a period ending in the year to 5 April 2014, fill in the return for income and gains in the year ended 5 April 2014. For example, the pension scheme's accounting year end may have been changed to 5 April from another date, and this results in a period dropping out of account.

If this is the case, fill in this return based on the entire period starting on the day after the end of the accounting period covered on the 2012-13 tax return and ending on 5 April 2014, even if this means using two sets of accounts.

**Do not** send us the pension scheme's accounts. If we need to see them, we will ask you for them later.

We may check any tax return. Please remember that there are penalties for supplying false information.

### If you need help

To get notes and helpsheets that will help you fill in this form, go to [hmrc.gov.uk/selfassessmentforms](http://hmrc.gov.uk/selfassessmentforms). If the guidance does not answer your questions, please phone the number shown above.

### What happens after you've sent your tax return

You'll receive a tax calculation. If you are due a repayment of tax, you'll usually get this automatically. But it may be set off against other tax instead if there is an amount due soon.

## Income for the year ended 5 April 2014

Please use blue or black ink to fill in the return. Round down to the nearest pound income and capital gains, and round up tax deductions. **Do not** include pence.

Pages 2 and 3 of this return include the most common income types found in registered pension schemes, and situations which may apply to such schemes. If your pension scheme received any income which is taxable, but not covered on pages 2 and 3, include the income on page 4 at 'Other taxable income'.

If you are filling in this return for a 12-month period of account ending in the year from 6 April 2013 to 5 April 2014, you must do so on a consistent basis. If you wish to change from the accounting date basis to the strict fiscal basis then the change in basis should not result in there being periods which drop out of account.

### UK income

Include all income from investments from which UK Income Tax has been deducted. This includes interest on loans and deposits, bank and building society interest, alternative finance receipts from alternative finance arrangements, interest on UK government securities including those held in the form of bearer bonds, interest from authorised unit trusts and annual payments from unauthorised unit trusts. Do not include income from UK dividends.

- |   |   |
|---|---|
| <p><b>1 Did you receive income from which UK Income Tax has been deducted?</b> <i>Put 'X' in the appropriate box</i></p> <p>Yes                      No <input checked="" type="checkbox"/></p> <p>If Yes, fill in boxes 1.1 to 1.5. If No, go to question 2.</p> <p><b>1.1 Total income from investments and deposits – amount after tax deducted</b></p> <p>•</p> <p><b>1.2 Tax deducted</b></p> <p>•</p> | <p><b>1.3 Gross amount before tax</b></p> <p>•</p> <p><b>1.4 Tax already reclaimed by or for the pension scheme on form R63N for the year ended 5 April 2014 or for the period of account ending in the year from 6 April 2013 to 5 April 2014 (if the return is filled in on the accounting date basis) which is included in box 1.2</b></p> <p>•</p> <p><b>1.5 Tax which has not already been reclaimed at the time this return is made</b> <i>Box 1.2 minus box 1.4</i></p> <p>•</p> |
|---|---|

### Income from overseas investments

Please enter in the boxes below the total income from overseas investments. Do not include income from stock dividends.

- |  |   |
|--|---|
| <p><b>2 Did you receive income from overseas investments?</b> <i>Put 'X' in the appropriate box</i></p> <p>Yes                      No <input checked="" type="checkbox"/></p> <p>If Yes, fill in boxes 2.1 to 2.4. If No, go to question 3.</p> <p><b>2.1 Total income from overseas investments – amount after tax deducted</b></p> <p>•</p> <p><b>2.2 UK Income Tax deducted</b></p> <p>•</p> | <p><b>2.3 UK Income Tax already reclaimed by the pension scheme for the year ended 5 April 2014 or for the period of account ending in the year from 6 April 2013 to 5 April 2014 (if the return is filled in on the accounting date basis) from overseas investments, which is included in box 2.2</b></p> <p>•</p> <p><b>2.4 UK Income Tax which has not already been reclaimed at the time this return is made</b> <i>Box 2.2 minus box 2.3</i></p> <p>•</p> |
|--|---|

## Trading income

Income declared here will be liable to tax at the trust rate.

- 3 Did you receive any trading income? Put 'X' in the appropriate box

Yes

No



If Yes, fill in boxes 3.1 to 3.5. If No, go to question 4.

- 3.1 Turnover and other business receipts, and so on

.

- 3.2 Expenses allowable for tax

.

- 3.2A Business Premises Renovation Allowance (BPRA)  
– balancing charges included in box 3.1

Read the notes and put the amounts of BPRA included in box 3.1, in box 3.2A

.

- 3.2B Business Premises Renovation Allowance (BPRA)  
– capital allowance included in box 3.2

Read the notes and put the amounts of BPRA included in box 3.2, in box 3.2B

.

- 3.3 Net profit

.

- 3.3A Put 'X' in the box, if box 3.3 has been reduced by enhanced capital allowances for designated environmentally beneficial plant and machinery

- 3.4 Allowable loss

.

- 3.5 Losses being claimed

.

## Income under a Deed of Covenant

- 4 Did you receive any income under a Deed of Covenant? Put 'X' in the appropriate box

Yes

No



If Yes, fill in boxes 4.1 to 4.3. If No, go to question 5.

- 4.2 Tax deducted

.

- 4.3 Gross amount before tax Box 4.1 + box 4.2

.

- 4.1 Total income received under a Deed of Covenant  
– amount after tax deducted

.

## Income paid under deduction of tax

Please enter all charges on the pension scheme's income paid under deduction of tax. Do not include pensions paid under Pay As You Earn (PAYE) or scheme administrator payments subject to the Accounting for Tax procedures.

- 5 Were any payments or charges on the pension scheme's income paid under deduction of tax? Put 'X' in the appropriate box

Yes

No



If Yes, fill in boxes 5.1 to 5.4. If No, go to question 6.

- 5.2 Tax deducted

.

- 5.3 Interest, alternative finance payments, rent, and so on paid under deduction of tax to anyone who normally lives abroad – gross amount before tax

.

- 5.1 Amounts paid under deduction of tax – gross amount before tax

.

- 5.4 Tax deducted

.

## Other taxable income

Income declared here will be liable to tax at the trust rate.

- 6 Did you receive any other taxable income which you have not already entered elsewhere in this return or did you make any taxable chargeable gain? Put 'X' in the appropriate box

Yes

No



If Yes, fill in boxes 6.1 to 6.6. If No, go to question 7.

- 6.1 Description of income or chargeable gain

- 6.3 Tax deducted

.

- 6.4 Gross amount before tax Box 6.2 + box 6.3

.

- 6.5 Taxable amount of the chargeable gain

.

- 6.6 Taxable amount of the chargeable gain qualifying for Entrepreneurs' Relief

.

- 6.2 Amount of taxable income after tax deducted

.

Other information for the year ended 5 April 2014

## Calculating the tax (or repayment) yourself

- 7 Do you want to calculate the tax (or repayment) due? Put 'X' in the appropriate box

Yes

No



If Yes, do it now and fill in boxes 7.1 to 7.4.

If No, go to question 8.

- 7.1 Tax due for 2013-14 before you make any payments on account If a repayment is due put a minus sign (-) in the box next to the £ sign

.

- 7.2 Your first payment on account for 2014-15, if appropriate

.

- 7.3 Put 'X' in the box if you are making a claim to reduce payments on account for 2014-15 and say why in the 'Additional information' box, box 13.2 on page 7

- 7.4 Put 'X' in the box, if you do not need to make payments on account

## Claiming a repayment

- 8 Do you want to claim a repayment? Put 'X' in the appropriate box

Yes

No



If Yes, fill in boxes 8.1 to 8.12 as appropriate.

If No, or the amount you are owed is below £10, we will set any amount you are owed against the next tax bill.

Now go to question 9.

**Who should the repayment (or payment) be sent to?**  
Put 'X' in the appropriate box

- 8.1 The pension scheme's bank or building society account

- 8.2 Your nominee's bank or building society account

*Fill in boxes 8.3 to 8.7 as appropriate. If you have ticked box 8.2 also fill in box 8.8 and box 8.9 (if applicable) and boxes 8.10 to 8.12.*

**Please give details of your (or your nominee's) bank or building society account for repayment**

- 8.3 The pension scheme's (or its nominee's) bank or building society

- 8.4 Name on account (entered at 8.3)

- 8.5 Account number

- 8.6 Sort code

- 8.7 Building society reference number

- 8.8 Put 'X' in the box if your nominee is your adviser - then fill in boxes 8.9 to 8.12, otherwise just fill in boxes 8.10 to 8.12.

- 8.9 Adviser's reference for you

### *Declaration for repayment*

**You must fill in the boxes below to authorise the nominee/adviser to receive repayment on your behalf. This authority must be signed by you. A photocopy of your signature will not be accepted.**

I authorise

- 8.10 Name of nominee/adviser

- 8.11 Nominee's/adviser's address

to receive, on my behalf, the amount due.

- 8.12 Signature

## Pension scheme contact details

Please give your or your adviser's name and phone number. If we need to ask you about the return it is often simpler to phone.

9.1 Your daytime phone number

0800 634 4862

9.2 Your name

Gavin McCloskey.

9.3 Your adviser's phone number, if applicable

9.4 Your adviser's name and address

9.5 Your adviser's reference for the pension scheme

## Changes to names and addresses

10 Is the name of the pension scheme on the front of the Notice wrong? Put 'X' in the appropriate box

Yes ☒ No

11 Is the name of the trustee on the front of the Notice wrong? This should be the trustee to whom correspondence and future returns should be addressed. Put 'X' in the appropriate box

Yes ☒ No

If you answer Yes to either question 10 or 11, please put the correct information on the front of this return.

12 Have there been any changes to the names and addresses of the trustees? Put 'X' in the appropriate box. If more than two, please report the further details in the 'Additional information' box on page 7 of this return or on a separate sheet.

Yes ☒ No

If Yes, please enter the details in the appropriate boxes on this page.

12.1 Retiring (or no longer acting) trustees' name and address

PEARSON JONES COMPANY (TRUSTEES)  
LTD. CLAYTON WOOD CLOSE,  
WEST PARK RING ROAD LEEDS  
LS18 6QE 3-6-14.

12.2 Retiring (or no longer acting) trustees' name and address

12.3 New trustees' name and address

PENSION PRACTITIONER, COM  
DAWS HOUSE  
33-35 DAWS LANE  
LONDON  
NW1 4SD 3-6-14

12.4 New trustees' name and address

12.5 Existing trustees' name and new address

12.6 Existing trustees' name and new address

## Additional information

- 13.1 Does this tax return contain figures that are provisional because you do not yet have final figures?

Put 'X' in the appropriate box

Yes ☒ No ☐

Page 8 of the *notes* explains the circumstances in which provisional figures may be used and asks for some additional information to be provided in box 13.2 below.

### 13.2 Additional information

## Declaration

You **must** fill in this part. Before sending back the completed tax return you must sign and date the statement in box 14.3 below. If you give false information or conceal any part of the pension scheme's income or chargeable gains you may be liable to financial penalties and/or you may be prosecuted.

- 14.1 Put 'X' in the box if this tax return has been filled in based on the 12 months accounts ending in the year from 6 April 2013 to 5 April 2014

14.1A Accounting year end date DD MM YYYY

- 14.2 Put 'X' in the box if this tax return has been filled in for a period ending on 5 April 2014

X

- 14.3 The information I have given in the tax return is correct and complete to the best of my knowledge and belief

Signature of trustee



Name in full (use capital letters)

GAVIN MCQUESEY. PENSION PRACTITIONER  
. Com

Date DD MM YYYY

05 03 2016.

## Self Assessment tax reference (as shown on the notice to file)

16287 93458.

Return to

Pension Schemes Services  
HM Revenue & Customs  
FitzRoy House  
Castle Meadow Road  
NOTTINGHAM  
NG2 1BD

Phone 0300 123 1079

Pension scheme name and correspondence address  
(please complete in full)PENSION PRACTITIONER.COM  
DOWNS HOUSE  
33-35 DOWNS LANE  
LONDON  
NW7. 4SD

## Adviser's reference

JOHN DOBBINS

Date DD MM YYYY

05 03 2016.

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## Accounts prepared for a 12-month period ending in the year to 5 April 2015

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If this is the case, fill in this return based on the entire period starting on the day after the end of the accounting period covered on the 2013-14 tax return and ending on 5 April 2015, even if this means using 2 sets of accounts.

**Do not** send us the pension scheme's accounts. If we need to see them, we will ask you for them later.

We may check any tax return. Please remember that there are penalties for supplying false information.

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## Income for the year ended 5 April 2015

Please use blue or black ink to fill in the return. Round down to the nearest pound income and capital gains, and round up tax deductions. **Do not** include pence.

Pages 2 and 3 of this return include the most common income types found in registered pension schemes, and situations which may apply to such schemes. If your pension scheme received any income which is taxable, but not covered on pages 2 and 3, include the income on page 4 at 'Other taxable income'.

If you are filling in this return for a 12-month period of account ending in the year from 6 April 2014 to 5 April 2015, you must do so on a consistent basis. If you wish to change from the accounting date basis to the strict fiscal basis then the change in basis should not result in there being periods which drop out of account.

### UK income

Include all income from investments from which UK Income Tax has been deducted. This includes interest on loans and deposits, bank and building society interest, alternative finance receipts from alternative finance arrangements, interest on UK government securities including those held in the form of bearer bonds, interest from authorised unit trusts and annual payments from unauthorised unit trusts. Do not include income from UK dividends.

- |  |  |
|--|--|
| <p><b>1 Did you receive income from which UK Income Tax has been deducted?</b> Put 'X' in the appropriate box</p> <p>Yes      No <input checked="" type="checkbox"/></p> <p>If Yes, fill in boxes 1.1 to 1.5. If No, go to question 2.</p> <p><b>1.1 Total income from investments and deposits – amount after tax deducted</b></p> <p>•</p> <p><b>1.2 Tax deducted</b></p> <p>•</p> | <p><b>1.3 Gross amount before tax</b></p> <p>•</p> <p><b>1.4 Tax already reclaimed by or for the pension scheme on form R63N for the year ended 5 April 2015 or for the period of account ending in the year from 6 April 2014 to 5 April 2015 (if the return is filled in on the accounting date basis) which is included in box 1.2</b></p> <p>•</p> <p><b>1.5 Tax which has not already been reclaimed at the time this return is made</b> Box 1.2 minus box 1.4</p> <p>•</p> |
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### Income from overseas investments

Please enter in the boxes below the total income from overseas investments. Do not include income from stock dividends.

- |   |  |
|---|--|
| <p><b>2 Did you receive income from overseas investments?</b> Put 'X' in the appropriate box</p> <p>Yes      No <input checked="" type="checkbox"/></p> <p>If Yes, fill in boxes 2.1 to 2.4. If No, go to question 3.</p> <p><b>2.1 Total income from overseas investments – amount after tax deducted</b></p> <p>•</p> <p><b>2.2 UK Income Tax deducted</b></p> <p>•</p> | <p><b>2.3 UK Income Tax already reclaimed by the pension scheme for the year ended 5 April 2015 or for the period of account ending in the year from 6 April 2014 to 5 April 2015 (if the return is filled in on the accounting date basis) from overseas investments, which is included in box 2.2</b></p> <p>•</p> <p><b>2.4 UK Income Tax which has not already been reclaimed at the time this return is made</b> Box 2.2 minus box 2.3</p> <p>•</p> |
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## Trading income

Income declared here will be liable to tax at the trust rate.

- |   |  |
|---|--|
| <p><b>3 Did you receive any trading income?</b> Put 'X' in the appropriate box</p> <p>Yes                      No <b>X</b></p> <p>If Yes, fill in boxes 3.1 to 3.5. If No, go to question 4.</p> <p><b>3.1 Turnover and other business receipts, and so on</b></p> <p>•</p> <p><b>3.2 Expenses allowable for tax</b></p> <p>•</p> <p><b>3.2A Business Premises Renovation Allowance (BPRA)</b><br/>– balancing charges included in box 3.1<br/>Read the notes and put the amounts of BPRA included in box 3.1, in box 3.2A</p> <p>•</p> | <p><b>3.2B Business Premises Renovation Allowance (BPRA)</b><br/>– capital allowance included in box 3.2<br/>Read the notes and put the amounts of BPRA included in box 3.2, in box 3.2B</p> <p>•</p> <p><b>3.3 Net profit</b></p> <p>•</p> <p><b>3.3A Put 'X' in the box, if box 3.3 has been reduced by enhanced capital allowances for designated environmentally beneficial plant and machinery</b></p> <p>•</p> <p><b>3.4 Allowable loss</b></p> <p>•</p> <p><b>3.5 Losses being claimed</b></p> <p>•</p> |
|---|--|

## Income under a Deed of Covenant

- |   |  |
|---|--|
| <p><b>4 Did you receive any income under a Deed of Covenant?</b><br/>Put 'X' in the appropriate box</p> <p>Yes                      No <b>X</b></p> <p>If Yes, fill in boxes 4.1 to 4.3. If No, go to question 5.</p> <p><b>4.1 Total income received under a Deed of Covenant</b><br/>– amount after tax deducted</p> <p>•</p> | <p><b>4.2 Tax deducted</b></p> <p>•</p> <p><b>4.3 Gross amount before tax</b> Box 4.1 + box 4.2</p> <p>•</p> |
|---|--|

## Income paid under deduction of tax

Please enter all charges on the pension scheme's income paid under deduction of tax. Do not include pensions paid under Pay As You Earn (PAYE) or scheme administrator payments subject to the Accounting for Tax procedures.

- |  |  |
|--|--|
| <p><b>5 Were any payments or charges on the pension scheme's income paid under deduction of tax?</b> Put 'X' in the appropriate box</p> <p>Yes                      No <b>X</b></p> <p>If Yes, fill in boxes 5.1 to 5.4. If No, go to question 6.</p> <p><b>5.1 Amounts paid under deduction of tax – gross amount before tax</b></p> <p>•</p> | <p><b>5.2 Tax deducted</b></p> <p>•</p> <p><b>5.3 Interest, alternative finance payments, rent, and so on paid under deduction of tax to anyone who normally lives abroad – gross amount before tax</b></p> <p>•</p> <p><b>5.4 Tax deducted</b></p> <p>•</p> |
|--|--|

## Other taxable income

Income declared here will be liable to tax at the trust rates.

- 6 Did you receive any other taxable income which you have not already entered elsewhere in this return or did you make any taxable chargeable gain? Put 'X' in the appropriate box

Yes

No

X

If Yes, fill in boxes 6.1 to 6.6. If No, go to question 7.

6.1 Description of income or chargeable gain

6.3 Tax deducted

.

6.4 Gross amount before tax Box 6.2 + box 6.3

.

6.5 Taxable amount of the chargeable gain

.

6.6 Taxable amount of the chargeable gain qualifying for Entrepreneurs' Relief

.

6.2 Amount of taxable income after tax deducted

.

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## Other information for the year ended 5 April 2015

### Calculating the tax (or repayment) yourself

- 7 Do you want to calculate the tax (or repayment) due? Put 'X' in the appropriate box

Yes

No

X

If Yes, do it now and fill in boxes 7.1 to 7.4.

If No, go to question 8.

7.1 Tax due for 2014-15 before you make any payments on account If a repayment is due put a minus sign (-) in the box next to the £ sign

.

7.2 Your first payment on account for 2015-16, if appropriate

.

7.3 Put 'X' in the box if you are making a claim to reduce payments on account for 2015-16 and say why in the 'Additional information' box, box 13.2 on page 7

7.4 Put 'X' in the box, if you do not need to make payments on account

## Claiming a repayment

- 8 Do you want to claim a repayment? Put 'X' in the appropriate box

Yes                      No **X**

If Yes, fill in boxes 8.1 to 8.12 as appropriate.

If No, or the amount you are owed is below £10, we will set any amount you are owed against the next tax bill. Now go to question 9.

**Who should the repayment (or payment) be sent to?**  
Put 'X' in the appropriate box

- 8.1 The pension scheme's bank or building society account

- 8.2 Your nominee's bank or building society account

Fill in boxes 8.3 to 8.7 as appropriate. If you have ticked box 8.2 also fill in box 8.8 and box 8.9 (if applicable) and boxes 8.10 to 8.12.

**Please give details of your (or your nominee's) bank or building society account for repayment**

- 8.3 The pension scheme's (or its nominee's) bank or building society

- 8.4 Name on account (entered at 8.3)

- 8.5 Account number

- 8.6 Sort code

- 8.7 Building society reference number

- 8.8 Put 'X' in the box if your nominee is your adviser – then fill in boxes 8.9 to 8.12, otherwise just fill in boxes 8.10 to 8.12

- 8.9 Adviser's reference for you

### Declaration for repayment

You must fill in the boxes below to authorise the nominee/adviser to receive repayment on your behalf. This authority must be signed by you. A photocopy of your signature will not be accepted.

I authorise

- 8.10 Name of nominee/adviser

- 8.11 Nominee's/Adviser's address

to receive, on my behalf, the amount due.

- 8.12 Signature

## Additional information

### 13.1 Does this tax return contain figures that are provisional because you do not yet have final figures?

Put 'X' in the appropriate box

Yes

No

X

Page 8 of the notes explains the circumstances in which provisional figures may be used and asks for some additional information to be provided in box 13.2 below.

### 13.2 Additional information

## Declaration

You **must** fill in this part. Before sending back the completed tax return you must sign and date the statement in box 14.3 below. If you give false information or conceal any part of the pension scheme's income or chargeable gains you may be liable to financial penalties and/or you may be prosecuted.

14.1 Put 'X' in the box if this tax return has been filled in based on the 12 months accounts ending in the year from 6 April 2014 to 5 April 2015

14.3 The information I have given in the tax return is correct and complete to the best of my knowledge and belief

Signature of trustee

14.1A Accounting year end date DD MM YYYY

Name in full (use capital letters)

GAVIN MCELRIK FOR  
PENSION PRODUCTION LTD.

Date DD MM YYYY

05 03 2016

14.2 Put 'X' in the box if this tax return has been filled in for a period ending on 5 April 2015

X

## Pension scheme contact details

Please give your or your adviser's name and phone number. If we need to ask you about the return it is often simpler to phone.

9.1 Your daytime phone number

08006344862

9.2 Your name

GAVIN MCCLOSKEY  
PENSIONPRACTITIONER.COM

9.3 Your adviser's phone number, if applicable

9.4 Your adviser's name and address

9.5 Your adviser's reference for the pension scheme

## Changes to names and addresses

10 Is the name of the pension scheme on the front of the Notice wrong? Put 'X' in the appropriate box

Yes No

11 Is the name of the trustee on the front of the Notice wrong? This should be the trustee to whom correspondence and future returns should be addressed. Put 'X' in the appropriate box

Yes No

If you answer Yes to either question 10 or 11, please put the correct information on the front of this return.

12 Have there been any changes to the names and addresses of the trustees? Put 'X' in the appropriate box. If more than 2, please report the further details in the 'Additional information' box on page 7 of this return or on a separate sheet.

Yes No

If Yes, please enter the details in the appropriate boxes on this page.

12.1 Retiring (or no longer acting) trustee's name and address

12.3 New trustee's name and address

12.4 New trustee's name and address

12.5 Existing trustee's name and new address

12.6 Existing trustee's name and new address

12.2 Retiring (or no longer acting) trustee's name and address

## Additional information

### 13.1 Does this tax return contain figures that are provisional because you do not yet have final figures?

Put 'X' in the appropriate box

Yes ☒ No

Page 8 of the notes explains the circumstances in which provisional figures may be used and asks for some additional information to be provided in box 13.2 below.

### 13.2 Additional information

## Declaration

You **must** fill in this part. Before sending back the completed tax return you must sign and date the statement in box 14.3 below. If you give false information or conceal any part of the pension scheme's income or chargeable gains you may be liable to financial penalties and/or you may be prosecuted.

14.1 Put 'X' in the box if this tax return has been filled in based on the 12 months accounts ending in the year from 6 April 2014 to 5 April 2015

14.3 The information I have given in the tax return is correct and complete to the best of my knowledge and belief

Signature of trustee



14.1A Accounting year end date DD MM YYYY

Name in full (use capital letters)

14.2 Put 'X' in the box if this tax return has been filled in for a period ending on 5 April 2015

☒

GAVIN MELLIS  
FOR PENSION PRACTITIONER .com  
Date DD MM YYYY

05 03 2016



# HM Revenue & Customs


## SA370 Appeal form

Please read the SA370 notes before you fill in this form to appeal against a penalty for sending your tax return late and/or paying your tax late. Using this form will help us identify your appeal and deal with it quicker.

Send this form to Self Assessment, HM Revenue & Customs, BX9 1AS within 30 days of the date shown on the front of your penalty notice. Late appeals may be accepted if you explain the reason for the extra delay.

If you haven't already done so, send us your tax return and/or pay any tax you owe now, to avoid further penalties.

To find out more about Self Assessment appeals go to [hmrc.gov.uk/sa/appeals-decisions.htm](http://hmrc.gov.uk/sa/appeals-decisions.htm)

 Please use black or blue ink and capital letters to fill in the boxes.

## Which tax year are the penalties for?

Tax year ended 5 April **2014.**

Tell us which penalties you want to appeal against below. Enter the amount of each penalty and the date of your penalty notice. You will find this at the top of the front page of your SA326D *Late tax return: Notice of penalty assessment* or SA370 *Notice of penalty assessment*.

## Penalties for filing your tax return late

1 day late – £100 penalty. To appeal against this penalty put 'X' in the box

Date of penalty notice DD MM YYYY

3 months late filing penalty amount

Date of penalty notice DD MM YYYY

6 months late filing penalty amount

Date of penalty notice DD MM YYYY

**600.**

**07 12 2015**

12 months late filing penalty amount

Date of penalty notice DD MM YYYY

**300.**

**07 12 2015**

## Penalties for paying your tax late

30 days late payment penalty amount

Date of penalty notice DD MM YYYY

6 months late payment penalty amount

Date of penalty notice DD MM YYYY

12 months late payment penalty amount

Date of penalty notice DD MM YYYY

## Your reason for making an appeal

In the space below, tell us why you're making an appeal, for example, because you believe you met a deadline or you had a reasonable excuse for missing it. Give as much information as you can, including relevant dates. Where possible provide evidence to support your appeal.



If you need more space continue on a separate sheet of paper and attach this to the back of your appeal.

THE SELF ASSESSMENT NOTICE WAS ISSUED TO A FORMER  
TRUSTEE ADMINISTRATOR OF THIS SCHEME, THAT HAS NOT ACTED  
SINCE 27 FEBRUARY 2014. WE NOTIFIED YOU OF THIS CHANGE  
ON 27 FEBRUARY 2014 BUT YOUR RECORDS WERE NOT UPDATED.  
I ATTACH COPIES OF SUBMISSIONS OF THESE CHANGES FOR  
YOUR REFERENCE.

## About you



If you are making this appeal on behalf of someone else, enter the details for that person.

### Tax reference

Enter the reference shown on your penalty notice

1 6 2 8 7 9 3 4 5 8.

### National Insurance number (if known)

### Full name

JOHN A DOBBINS LTD PENSION  
FUND

### Address

DANS HOUSE  
33-35 DANK LANE  
LONDON

NW7. 4SD

## What to do next

- Please make sure you sign and date your appeal
- Send this form to Self Assessment, HM Revenue & Customs, BX9 1AS

### Signature

### Date DD MM YYYY

05 03 2016.

### Your daytime phone number

0800 - 634-4862.

Your name and address - if different to the name  
and address you have entered above

If you have signed this appeal on behalf of someone else,  
enter the capacity in which you have done this  
For example, agent, executor or personal representative

ADMINISTRATOR