



About this form

This form is designed to be filled in on screen. You must answer all the questions except those marked 'optional'. You can't save the form but once you've completed it you'll be able to print a copy and post it.

Use this form to register your scheme to operate tax relief at source on contributions to the pension scheme, or to notify any changes to a scheme that currently operates relief at source (RAS).

Completing the form

You must complete all of the boxes in the relevant part(s) of the form that apply to your scheme. Please note that if the form is incomplete or, if you do not sign it and/or you do not send the required documentation, your registration will not be processed and the form will be returned to you.

Please tick boxes where indicated. The information you need to help you complete the form is:

- the pension scheme name
- the Pension Scheme Tax Reference (PSTR)
- details of the bank or building society account to which repayments are to be made
- details of who can sign the repayment claims
- details of who we should contact with any RAS queries for this scheme

You can also find guidance in the Pensions Tax Manual at PTM044220.

Scheme documents

Do you have:

- a Board's Resolution Certificate?
- an original bank document showing account details?
- an original specimen signature for the authorised authorities?

☒ Yes

☐ No

Scheme details

Pension scheme name

LLOYD'S SCHEME

Pension Scheme Tax reference (PSTR)

20009156RW

Do you wish to:

- ☒ register the scheme to operate tax relief at source on contributions made to the scheme?
- ☐ notify any changes to tax relief at source information for this scheme?

Details of new bank or building society to which repayments should be made

If you only have an overseas bank account with an account number containing more than 8 digits you will need to contact your bank to obtain an abridged 8-digit number.

Bank details

Bank or building society name

LLOYD'S SCHEME

Account number

53853257

Sort code

23 - 05 - 80

Address of the new bank or building society

Is this address in the UK?

☒ Yes

☐ No

Line 1

One Southampton Row

Line 2

London

Line 3 (optional)

Postcode

WC1B 5HA

New account name

LLOYD'S SCHEME

New authorised signatories

If you're submitting a new registration for RAS you must provide the names of up to 5 individuals appointed by the scheme administrator or a resolution of its board or equivalent managing body to sign claims on behalf of the scheme administrator.

Enter details of the new signatories.

New Signatory 1

Title

Mr

First name

DARREN

Surname

LLOYD

New Signatory 2

Title

N/A

First name

R C ADMINISTRATION LTD

Surname

AUTHORISED SIGNATORY

New Contact

If this is a new registration for RAS, you must provide the:

- full name
- phone number
- email address

if held for at least one individual within your organisation that we should contact if we have any enquiries about the completed form, or about claims under RAS for this scheme. This individual may also be an authorised signatory.

New Contact 1

Title

Ms

First name

EMILY

Surname

MCALISTER

Telephone number

0330 311 0088

Does the contact have an email address?

☒ Yes

☐ No

Email address

EMILY@RETIREMENT.CAPITAL

Details of the submitter

The form must be signed by either the scheme administrator or the practitioner acting on behalf of the scheme administrator. The signatory details and ID number, if held, should be provided. If you are completing the form as a supplementary page to the registration for tax relief and exemptions, you do not need to sign this application as the declaration signed as part of the registration form also covers your RAS application.

No repayments will be made unless the registration is received with the supporting documents.

I attach:

- ☒ the Board's Resolution showing the person(s) name at 'Current authorised signatories' or 'New authorised signatories' as authorised signatories

I attach:

- ☒ original bank document showing account details - a Board's Resolution must be attached when updating a change of bank details

I attach:

- ☒ original specimen signatures for the authorised signatories

I am submitting this registration/amendment in my capacity as:

- ☒ Scheme Administrator
☐ Practitioner ID

Scheme Administrator ID

A 2001880

Are you:

- ☐ an individual
☒ an organisation

Organisation name

R C ADMINISTRATION LIMITED

Address

Is this address in the UK?

- ☒ Yes
☐ No

Line 1

1A PARK LANE

Line 2

POYNTON

Line 3 (optional)

Postcode

SK12 3RD

Telephone number

03303110088

Does your organisation have an email address?

- ☒ Yes
☐ No

Email address

EMILY@RETIREMENT.CAPITAL

Declaration

If you are completing the form as a supplementary page to the registration for tax relief and exemptions, you do not need to sign this application as the declaration signed as part of the registration form also covers your RAS application.

☒ I confirm that the information I have given is correct.

When you have printed the form, please sign, print name and date it in the appropriate boxes.

Signature

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Print name

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Date

DD MM YYYY

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What to do now

Please sign and date the form in the fields provided on the printed output.

The completed form together with:

- the Scheme Administrator's authority or the Board's Resolution, or similar authority
- a bank or building society original document for the account into which repayments are to be made
- original specimen signatures of those authorised to sign repayment claims

should be sent to:

Pension Schemes Services
HM Revenue and Customs
BX9 1GH

No repayments will be made unless the registration is received with the supporting documents.

How we use your information

HM Revenue and Customs is a Data Controller under the Data Protection Act 1998. We hold information for the purposes specified in our notification to the Information Commissioner, including the assessment and collection of tax and duties, the payment of benefits and the prevention and detection of crime, and may use this information for any of them. We may get information about you from others, or we may give information to them. If we do, it will only be as the law permits to:

- check the accuracy of information
- prevent or detect crime
- protect public funds

We may check information we receive about you with what is already on our records. This can include information provided by you, as well as by others, such as other government departments or agencies and overseas tax and customs authorities.

We will not give information to anyone outside HM Revenue and Customs unless the law permits us to do so.

Print this form

Click the 'Preview' button to create a copy for you to print and post. Please ensure that you check your form carefully before you click 'Preview'. If you make any changes afterwards, you must click 'Preview' again to create a new copy with the changes included.