

Scheme Name:	2009/10	
	Y	N
LITTLE & RUTHERFORD		
Event number 1 - Unauthorised payments		2
Event number 2 - Payments exceeding 50% of standard lifetime allowance		2
Event number 3 - Early provision of benefits		2
Event number 4 - Serious ill-health lump sum		2
Event number 5 - Cessation of ill-health pension		2
Event number 6 - Benefit crystallisation events and enhanced lifetime allowance or enhanced protection		2
Event number 7 - Pension commencement lump sum		2
Event number 8 - Pension commencement lump sum: primary and enhanced protection		2
Event number 8A - Stand-alone lump sum		2
Event number 9 - Transfers to qualifying recognised overseas pension schemes		2
Event number 10 - Investment-regulated pension scheme		2
Event number 11 - Changes in scheme rules		2
Event number 12 - Changes to rules of a scheme treated as more than one scheme pre-A Day		2
Event number 13 - Change in legal structure of scheme		2
Event number 14 - Change in number of members		2
Event number 15 - Alternatively secured pension		2
Event number 16 - Transfer lump sum death benefit		2
Event number 17 - Lump sum payment after the death of a member aged 75 or over		2
Event number 18 - Scheme chargeable payment		2
Event number 19 - Country or territory of establishment		2
Event number 20 - Occupational pension scheme		2

This form may be used to amend information declared on the original Pension Scheme Return.
Alternatively, you can amend the Pension Scheme Return online. Go to www.hmrc.gov.uk and
under *do it online* select *Pension Schemes*.

About the pension scheme

1] This return is for the year to 5 April YYYY:

2009

2] Scheme information

2.1 Pension Scheme Tax Reference (PSTR)

0000000000R0

2.2 Pension scheme name

LITTLE - RUTHERFORD

3] Has the return been completed for either:

- a) a period other than the 12 months ending on 5 April? or
b) if the scheme was newly registered during the period covered by this return, for a period other than the period from the date of registration to 5 April?

Yes ☒ If Yes, go to box 3.1

No ☐ If No, go to box 4

3.1 How many accounting periods are covered by this return?

01

3.2 Accounting period(s) DD MM YYYY

From

01 04 2009

To

31 03 2010

From

00 00 0000

To

00 00 0000

From

00 00 0000

To

00 00 0000

From

00 00 0000

To

00 00 0000

From

00 00 0000

To

00 00 0000

4] During the period covered by this return was the aggregate of payments to and from the scheme greater than £100,000?

Yes ☒ If Yes, go to box 4.1

No ☐

If No, please enter the amount below then go to box 5

£

4.1 Total amount of the pension contributions received

£ 242,000

4.2 Total amount of transfer-in payments

£ 303,576

4.3 Total amount of transfer-out payments

£ NIL

4.4 Total amount paid out in lump sums and lump sum death benefits

£ 200,600

<p>4.5 Total amount paid out to purchase lifetime annuities and scheme pensions from an insurance company</p> <p>£ nil</p>	<p>7 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any shares in the sponsoring employer if it was a company?</p> <p>Yes <input type="checkbox"/> If Yes, go to box 7.1</p> <p>No <input checked="" type="checkbox"/> If No, go to box 8</p>
<p>4.6 Total amount borrowed</p> <p>£ nil</p>	
<p>4.7 Other</p> <p>Give a brief description max 150 characters</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Amount</p> <p>£</p>	<p>7.1 Total number of shares held at the end of the period</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>7.2 Total cost or market value of the shares held at the end of the period</p> <p>£</p> <p>Say whether this amount is:</p> <p>Market value <input type="checkbox"/></p> <p>Cost <input type="checkbox"/></p>
<p>5 At the end of the period covered by this return, did the scheme have assets with a total value before pension liabilities greater than £400,000?</p> <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If No, please state the amount</p> <p>£</p>	<p>7.3 Total number of shares purchased or subscribed for</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>7.4 Total cost of the shares purchased or subscribed for</p> <p>£</p>
<p>6 At any time during the period covered by this return, did the scheme, either directly or indirectly, own assets that it had acquired from either:</p> <ul style="list-style-type: none"> a sponsoring employer or any person connected with that employer, or a person who was a director of or a person who is connected to a director of a close company that is also a sponsoring employer, or a person who was either a sole owner or partner or a person connected with the sole owner or partner of a business which was a sponsoring employer, or a member or person connected with a member? <p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <p>If No, and you answered No at box 4 and box 5, go to Declaration.</p> <p>If No, and you answered Yes at box 4 or box 5, go to box 11.</p> <p>If Yes, go to box 7.</p>	<p>7.5 Total number of shares sold, or otherwise disposed of</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>7.6 Total amount of any consideration received from the sale or disposal of the shares in the sponsoring employer country</p> <p>£</p> <p>7.7 Were any disposals made to a connected party or connected parties?</p> <p>Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>7.8 Total amount of any dividends or other receipts</p> <p>£</p>

7.9 The name and Company Registration Number (CRN) of the company or companies to which the shares relate(d)

Name

CRN

Name

CRN

Name

CRN

Name

CRN

If you need to provide details for additional companies, please use a separate sheet.

8. At any time during the period covered by this return, did the scheme, either directly or indirectly, own any land or interest in land that it had acquired from a connected party or connected parties?

Yes ☒ If Yes, go to box 8.1

No ☐ If No, go to box 9

8.1 Total cost or market value of any land or interest in land owned by the scheme at the end of the period

£ 390,000

Say whether this amount is:

Market value ☐

Cost ☒

8.2 Total cost of any land or interest in land, or premium paid to acquire a leasehold interest in land

£ 390,000

8.3 Total sale proceeds of any land sold, or interest in land sold, or premiums on disposal of a leasehold interest in land

£ nil

8.4 If any land or interest in land was disposed of without any consideration, state the total cost or market value

£ nil

State whether this amount is:

Market value ☐

Cost ☐

8.5 Were any disposals made to a connected party or connected parties?

Yes ☐ No ☐

8.6 Total amount of income received from land or interest in land

X

£

8.7 Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes ☐ No ☒

9. At any time during the period covered by this return, were any amounts outstanding from loans made to a connected party or connected parties?

Yes ☐ If Yes, go to box 9.1

No ☒ If No, go to box 10

9.1 Total amount outstanding at the end of the period

£

9.2 Total amount of any loans made

£

9.3 Total amount of any loans repaid

£

9.4 Total amount of interest received

£

10 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any assets acquired from a connected party, other than shares in the sponsoring employer if it was a company, land, interest in land or loans?

Yes ☐ If Yes, go to box 10.1

No ☒ If No, go to box 11

10.1 Total cost or market value of any assets at the end of the period

£

Say whether this amount is:

Market value ☐

Cost ☐

10.2 Nature of any assets acquired during the period of this return

Forms of transport other than private motor vehicles ☐

Plant and machinery ☐

Fixtures and fittings ☐

Quoted shares ☐

Unquoted shares ☐

Tangible moveable property ☐

Insurance company investments ☐

Other ☐

If other, give brief description max 150 characters

10.3 Total cost of assets acquired

£

10.4 Did you dispose of any assets acquired?

Yes ☐ If Yes, go to box 10.5

No ☐ If No, go to box 10.8

10.5 Nature of any assets disposed of

Forms of transport other than private motor vehicles ☐

Plant and machinery ☐

Fixtures and fittings ☐

Quoted shares ☐

Unquoted shares ☐

Tangible moveable property ☐

Insurance company investments ☐

Other ☐

If other, give brief description max 150 characters

10.6 Total consideration received from the disposal of assets

£

10.7 Were any disposals made to a connected party or connected parties?

Yes ☐ No ☐

10.8 Total amount of income received from assets

£

11 At any time during the period covered by this return, was there any cash, cash on deposit or were there any current account balances held by the scheme?

Yes ☒ If Yes, go to box 11.1

No ☐ If No, go to box 12

11.1 Total amount of all cash and bank balances at the beginning of the period

£

11.2 Total amount of all cash and bank balances at the end of the period

£

11.3 Total amount of interest credited to these accounts

£

12 At any time during the period covered by this return, did the scheme, either directly or indirectly, own any assets acquired at arm's length?

Yes ☐ If Yes, go to box 12.1
No ☒ If No, go to Declaration

12.1 Total cost or market value of any assets owned at the end of the period

£

Say whether this amount is:

Market value ☐

Cost ☐

12.2 Nature of any assets acquired during the period of this return

Quoted shares ☐

Unquoted shares ☐

Land or interest in land ☐

– Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes ☐ No ☐

Loans ☐

Forms of transport other than private motor vehicles ☐

Plant and machinery ☐

Fixtures and fittings ☐

Tangible moveable property ☐

Insurance company investments ☐

Other ☐

If other, give brief description max 150 characters

12.3 Total cost of any assets acquired

£

12.4 Did you dispose of any assets acquired at arm's length?

Yes ☐ If Yes, go to box 12.5
No ☐ If No, go to box 12.8

12.5 Nature of any assets disposed of

Quoted shares ☐

Unquoted shares ☐

Land or interest in land ☐

– Was any part of the land or interest in land residential property as defined in Schedule 29A of Finance Act 2004?

Yes ☐ No ☐

Loans ☐

Forms of transport other than private motor vehicles ☐

Plant and machinery ☐

Fixtures and fittings ☐

Tangible moveable property ☐

Insurance company investments ☐

Other ☐

If other, give brief description max 150 characters

12.6 Total consideration received from the disposal of any assets

£

12.7 Were any disposals made to a connected party or connected parties?

Yes ☐ No ☐

12.8 Total amount of income from assets received

£