



RHONDDA CYNON TAF

Annual Allowance Scheme Pays Notice

This form should be completed if you wish to elect for the Rhondda Cynon Taf Pension Scheme to pay any Annual Allowance tax charge you are subject to. To be eligible for the Scheme Pays Election, the growth of your benefits in the Local Government Pension Scheme in the relevant tax year exceeds £40,000, or the relevant tapered Annual Allowance, and the amount of the Annual allowance Charge for which you are liable for the relevant tax year exceeds £2,000.

Part A.

Personal Details			
Title:		Full Name:	
Home Address:			
		Post Code:	
NI Number:		Date of Birth:	
Employer:			
Pay Reference No.:			
Telephone Number:		Mobile Number:	
Email Address:			

Annual Allowance Charge Details	
Tax year in which the Annual Allowance has been exceeded:	
Annual Allowance Tax Charge for which there will be a joint liability between myself and the scheme administrator. This is the amount of tax that you have told HMRC that the Fund will pay on your behalf.	
Are you subject to the Tapered Annual Allowance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you are subject to the Tapered Annual Allowance, how much is your Annual Allowance for the 2018/2019 year?	£

Part B.

Anticipated Events						
Within the tax year that applies to the Annual Allowance as stated herein, do you expect to:						
Retire from the Rhondda Cynon Taf Pension fund? (Please Tick appropriate. If Yes, please enter date)		Yes		No	Date:	
Reach age 75 without having taken all of your benefits from the scheme? (Please tick appropriate)		Yes		No	Date:	

Member Declaration

I understand that:

- this notice cannot be revoked, and
- Future benefits to be paid from the pension scheme will be adjusted to take account of the payment of the annual allowance charge made by the scheme.

I confirm that:

- The growth in my benefits in the Local Government Pension Scheme in the relevant year exceeds £40,000 or the relevant tapered Annual Allowance
- The amount of the Annual Allowance Charge for which I am liable for the relevant tax year exceeds £2,000 even though the amount stated above may be lower.
- The amount specified above has been calculated at the correct relevant rate as described in section 237B(4) of the Finance Act 2004.

Signed:		Date:
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Please return this form to us at:

Pension Section, Rhondda Cynon Taf County Borough Council,
Bronwydd House, Porth, CF39 9DL

Tŷ Bronwydd / Bronwydd House
Y Porth, Rhondda, CF39 9DL

Ffôn/Tel: 01443 680611
Ebost: pensiynau@rctcbc.gov.uk
Email: pensions@rctcbc.gov.uk
Gwefan / Website: www.rctpensions.org.uk

B Davies CPFA
Cyfarwyddwr Cyllid a Gwasanaethau Digidol, Director of Finance and Digital Services, Bronwydd, Y Porth/Porth CF39 9DL

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Croesawn ohebu yn Gymraeg a fydd gohebu yn y Gymraeg ddim yn arwain at oedi. Rhowch wybod inni beth yw'ch dewis iaith e.e Cymraeg neu'n ddwyieithog.
We welcome correspondence in Welsh and corresponding with us in Welsh will not lead to a delay. Let us know your language choice if Welsh or bilingual.

