

Carry Forward Form

FOR COMPLETION WHERE THE MEMBER IS 'CARRYING FORWARD' UNUSED ANNUAL ALLOWANCE FROM PREVIOUS TAX YEARS

Applicant					
Title (circle or insert as appropriate)	Mr	Mrs	Ms	Miss	Other:
Forename(s)					
Surname					
Permanent Residential Address					
		Postcode			

Total gross contribution to be paid in the current tax year (all schemes you contribute to)	
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Carry Forward

Please complete the section below confirming the total gross contributions paid in the three preceding tax years. The historic and current annual allowance is shown overleaf. Please also confirm if you were subject to the Tapered Annual Allowance in each of the three preceding tax years.

Tax Year	Contribution paid	Max Carry forward allowance	Subject to Tapered Annual Allowance Y / N

<input type="checkbox"/>	I confirm I was a member of a registered pension scheme in the tax years I am carrying forward unused relief
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Signature	
Members Signature	
Date	

Annual Allowances

2014/2015	£40,000
2015/2016	£40,000 ¹
2016/2017	£40,000 ²
2017/2018	£40,000

Note 1

If you have flexibly accessed your pension savings and have triggered the Money Purchase Annual Allowance Rules (MPAA) your annual allowance will have reduced from £40,000 to £4,000 per annum for money purchase schemes.

Note 2

If you are subject to the tapered annual allowance (as your adjusted income in a tax year exceeds £150,000) your annual allowance will be reduced by £1 for every £2 of adjusted income above £150,000. The maximum reduction in the annual allowance is £30,000, giving a tapered annual allowance of £10,000.

Please return your completed form to:

DP Pensions Ltd
Bridewell House
Bridewell Lane
Tenterden
Kent TN30 6FA

Tel 01580 762 555
Fax 01580 766 444

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enquiries@dapco.co.uk

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