



THE HARTLEY PENSION

CARRY FORWARD CONTRIBUTIONS FORM

Title	<input type="text"/>	Surname	<input type="text"/>
Forenames	<input type="text"/>		
SIPP Scheme Number	<input type="text"/>		
Single Contributions	Personal (Net) £	<input type="text"/>	Employer (Gross) £
		<input type="text"/>	

CARRY FORWARD ENTITLEMENT

I confirm that I have been a member of a Registered Pension Scheme for the appropriate years and have sufficient Carry Forward allowance to make the contribution quoted above. The allowance is made up as follows, and evidence can be supplied if required:

Year	Salary	Carry Forward Allowance	Contribution Unpaid
2012/13	£	£50,000	£
2013/14	£	£50,000	£
2014/15	£	£40,000	£

EMPLOYMENT STATUS

Employed Self-employed Unemployed Retired

Employer Name (if Employed)	<input type="text"/>		
Employer's Address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	Company Registration No	<input type="text"/>

Please return completed form to:

Hartley Pensions Ltd, 5th Floor, 25 Marsh Street, Bristol, BS1 4AQ. Authorised and regulated by the Financial Conduct Authority 735936 and registered in England and Wales 094695576. T:0117 316 9991 E: admin@hartleypensions.co.uk W: www.hartleypensions.com



TAX ENTITLEMENT

Please read the statement below and select the one that applies to you to enable us to establish whether you are eligible for tax relief or whether any limits apply:

- 1. I have relevant UK Earnings chargeable to Income Tax or general earnings from Overseas Crown Employment subject to UK tax in this year.
- 2. I have, or will have been a resident in the UK at some point during this tax year.
- 3. My Spouse/Civil Partner, has general earnings from Overseas Crown Employment subject to UK tax for this year.
- 4. I, or my Spouse/Civil Partner, are in Overseas Crown Employment but for this tax year do not have relevant UK earnings subject to UK Tax.
- 5. None of the above

1 or 2 - Hartley will reclaim basic rate tax on your personal contributions

3 or 4 - Hartley will reclaim basic rate tax on personal contributions up to £3600 (Gross)

5 - Hartley will not reclaim any tax relief on personal contributions

HMRC PENSION PROTECTION

Please advise if you have registered for Protection with HMRC.

- Enhanced Primary Fixed Fixed 2014 Individual

Please note: if you have HMRC Protection and make a contribution in to your SIPP, the Protection may be lost which could result in a tax liability.

It is recommended that you take advice from an Independent Financial Adviser.

Please ensure that any cheque representing a contribution to your SIPP is made payable to:
"The Hartley Pension Scheme re (Your name)"

Personal Contributions are payable net of basic rate tax.

HMRC PENSION PROTECTION

- I confirm that the total gross contributions made to all UK registered pension schemes of which I am entitled to tax relief in any year will not exceed the higher of £3,600 gross or 100% of my UK relevant earnings.
- I will notify the Scheme Administrator if I am no longer entitled to tax relief on my contributions no later than the end of the tax year or within 30 days of from the date of change.
- I confirm that the information provided on this Contribution Form is correct.

It is a serious offence to make false statements and doing so could lead to prosecution.

Signature

Date

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