

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)	
If you are subject to the Tapered Annual Allowance your Tapered Annual Allowance for the current tax year	

Carry Forward

Please complete the section below confirming the total gross contributions paid in the three previous tax years. If you were subject to the Tapered Annual Allowance in any of the three previous tax years please confirm the amount applying to you.

Tax Year	Contribution paid	Remaining unused Annual Allowance for the tax year	Amount of Tapered Annual Allowance if applicable

<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	

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. You cannot use carry forward to increase your pension inputs to more than the MPAA.

Note 2

If you are subject to the tapered annual allowance (as your adjusted income in a tax year exceeds £240,000) your annual allowance will be reduced by £1 for every £2 of adjusted income above £240,000. The maximum reduction in the annual allowance is £36,000, giving a tapered annual allowance of £4,000.

Please return your completed form to:

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