

## Pension Scheme administrator: Notification of tax deducted

This form should be completed by the pension scheme administrator, within 30 days of making one of the following lump sum death benefits that is subject to the special lump sum death benefits charge under section 206 Finance Act 2004 to a trust that is not a bare trust:

- · defined benefits lump sum death benefit
- uncrystallised funds lump sum death benefit
- drawdown pension fund lump sum death benefit
- flexi-access drawdown fund lump sum death benefit
- pension protection lump sum death benefit
- annuity protection lump sum death benefit

The trust receiving the payments should keep this form. The trust will need this so that they can provide this information to the beneficiary.

1 Nature of the lump sum death benefit payment	6 Pension scheme name
defined benefits lump sum death benefit	
uncrystallised funds lump sum death benefit	7 Pension Scheme Tax Reference (PSTR)
drawdown pension fund lump sum death benefit	
flexi-access drawdown fund lump sum death benefit	8 Name of trust receiving payment
pension protection lump sum death benefit	
annuity protection lump sum death benefit	9 Address of trust
2 Amount of payment before tax taken off £ 0 0	
Income tax deducted by me under section 206 Finance Act 2004	Postcode
£ 00	10 Name of deceased member
4 Net payment	
£ 00	Date of birth of deceased member DD MM YYYY
5 Date payment was made DD MM YYYY	
	Date of death of deceased member DD MM YYYY

<b>Signature and date</b> I confirm that the information given on this form is correct.	
Signature	Date DD MM YYYY

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