



### About this form

At the UK Spring Budget 2017 it was announced that certain transfers to qualifying recognised overseas pension schemes (QROPS) will become taxable with effect from 9 March 2017.

To continue to be a QROPS, all QROPS scheme managers must confirm that they understand and will operate the new tax charge. As a QROPS scheme manager you must complete this new undertaking and send this to HMRC.

Your completed undertaking must reach HMRC at the below address by 13 April 2017.

Pension Schemes Services  
HM Revenue & Customs  
Ferrers House  
Castle Meadow Road  
NOTTINGHAM  
NG2 1BB  
United Kingdom

If by the 13 April 2017 HMRC has not received the new undertaking your scheme will automatically cease to be a QROPS.

To find out more information about the pension tax rules for overseas pensions go to [www.gov.uk/government/collections/overseas-pension-schemes](http://www.gov.uk/government/collections/overseas-pension-schemes)

To find out what you can expect from us and what we expect from you go to [www.gov.uk/hmrc/your-charter](http://www.gov.uk/hmrc/your-charter) and have a look at *Your Charter*.

### About the QROPS

<p>1 Name of QROPS</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<p>2 HMRC reference number</p> <p><i>This is the QROPS reference number, allocated to the scheme by HMRC, when the notification that it met the requirements to be a recognised overseas pension scheme was acknowledged</i></p> <p>QROPS <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/></p>
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### Undertakings

3 Please tick the boxes below

I understand that in some circumstances a transfer of funds will give rise to a liability for me as scheme manager to pay tax in the UK

I undertake to comply with any requirement to pay tax and provide information to HMRC relating to taxable transfers.

### Declaration

This undertaking and declaration must be signed by the scheme manager. If the scheme manager is an organisation, the person responsible for the scheme within the organisation must sign the form.

<p>4 Name of the person signing the form</p> <input type="text"/> <input type="text"/>	<p>To the best of my knowledge and belief the information given in this form is correct and complete.</p> <p>Signature of the scheme manager</p> <input type="text"/> <input type="text"/>
<p>5 Capacity of the person signing the form</p> <input type="text"/> <input type="text"/>	<p>Date of undertaking DD MM YYYY</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>