

Estate Pension Charges etc

for the year ended 5 April 2021 (2020-21)

Name of deceased Tax reference

If you want help, look up the box numbers in the notes on Estate Pension Charges. For help filling in this form, go to www.gov.uk/taxreturnforms and read the notes and helpsheets.

Tax charges arising from unauthorised payments and transfers by	y UK or overseas pension schemes
Value of pension benefits transferred subject to the overseas transfer charge	23.1 £
Tax paid by your pension scheme on your overseas transfer charge	23.2 £
 Amount of unauthorised payment from a pension scheme, 'not subject to surcharge' 	23.3 £
 Amount of unauthorised payment from a pension scheme, 'subject to surcharge' 	23.4 £
Foreign tax paid on an unauthorised payment (in pound sterling)	23.5 £

Taxable lump sum payments from overseas pension schemes	
Taxable short service refund of contributions from an overseas pension scheme	23.6 £
Taxable lump sum payment (overseas pension schemes only)	23.7 £
Foreign tax paid on boxes 23.6 and 23.7 (in pound sterling)	23.8 £