

Your scheme details:

Carlton James Retirement Fund

1. Introduction

The following are the details that were on the scheme return submitted on 11 November 2020 12:53 PM.

The scheme return details were confirmed by Miss Emily McAlister.

2. Scheme details (basic)

Basic details	
Scheme name	Carlton James Retirement Fund
PSR number	12017274
Scheme address	C/o Pension Practitioner Office 12, Venture Wales Building Pentrebach MERTHYR TYDFIL Mid Glamorgan CF48 4DR United Kingdom
Billing address	Same as scheme address
Scheme type	Occupational
Benefit type	Defined contribution
Current status	Open to new members since 12 August 2014
Scheme year-end (DD/MM)	05/04 since 12 August 2014
HMRC reference number (PSTR)	00815782RM

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3. Scheme details (membership, age profiling, leavers)

Small scheme details	
The scheme has fewer than 12 members?	Yes
All members' trustees/directors?	Yes
Unanimous/independent decisions?	Yes

Number of members as at 5 April 2018 The Pensions Regulator requires to know the number of members present at the scheme year-end between the dates 1 April 2018 and 31 March 2019.	
Active members	0
Deferred members	6
Pensioner members	3
Total members	9

Number of members as at 5 April 2019 The Pensions Regulator requires to know the number of members present at the scheme year-end between the dates 1 April 2019 and 31 March 2020.	
Active members	0
Deferred members	6
Pensioner members	3
Total members	9

Age Profiling		
	50 to 59	60 and over
Active and deferred	6	0

Scheme Leavers as at 5 April 2019 The Pensions Regulator requires to know the number of scheme leavers during the year up to the scheme year end given for the latest membership figures above.	
Any scheme leavers during the latest membership year	No

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4. Scheme details (assets and contributions, Scheme investments)

Scheme assets and contributions as at the latest membership effective date of 5 April 2019.	
Total net assets	£2904626.78
Total employer contributions over the year	£0.00
Total employee contributions over the year	£0.00
Total transfers into the scheme over the year	£0.00

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5. Record-keeping

Common data	
Have you measured your common data in the last three years?	Yes
When did you last measure your common data?	April 2020
What percentage of this data have you assessed to be present and accurate?	100%

Scheme-specific ('conditional') data	
Have you measured your scheme-specific ('conditional') data in the last three years?	Yes
When did you last measure your scheme-specific ('conditional') data?	April 2020
What percentage of this data have you assessed to be present and accurate?	100%

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6. Trustees

Trustee	
Name of trustee	Mr Robert Holmes
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	17 Beranburh Field Wroughton Swindon SN4 0QL United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Simon Calton
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	67 Britten Road SWINDON SN25 2HQ United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Alan Edwards
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	27 St. Margaret's Road SWINDON SN3 1RU United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

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Trustee	
Name of trustee	Mr Andrew Ody
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	20 Broadacres Broad Town SWINDON SN4 7RP United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Ashni Joshi
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	191 Oldfield Lane North GREENFORD Middlesex UB6 8PN United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Julian Teicht
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	Hurst Cottage, Outdowns Effingham LEATHERHEAD Surrey KT24 5QP United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

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Trustee	
Name of trustee	Mr Noyan Nihat
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	6 Buckingham Avenue LONDON N20 9BX United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Henry Jodrell
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	Church Farm House Easton Grey MALMESBURY Wiltshire SN16 0PF United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Stuart Newland
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	98 Thetford Way SWINDON SN25 1WJ United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

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Trustee	
Name of trustee	Mr Beverley Barnett
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	The Bungalow, Clyngwyn Terrace Blaenrhondda TREORCHY Mid Glamorgan CF42 5SH United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

Trustee	
Name of trustee	Mr Nigel Scott
Chair of trustees	No
Type of trustee	Employer-appointed trustee
Professional trustee	No
Address of trustee	4 Manor Gardens SWINDON SN2 2ND United Kingdom
Direct telephone number	08006344862
Direct email address	info@pensionpractitioner.com

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7. Employer details

Current Employer(s)	
Employer's name	CARLTON JAMES PRIVATE AND COMMERCIAL LTD
Employer type	Principal Employer
Organisation type	Private limited company
Address of employer	Lime Kiln Royal Wootton Bassett SWINDON SN4 7HF United Kingdom
Employer status	Active since 06 June 2014
Employer email address	info@pensionpractitioner.com
Companies House number	09074495

Employer relationship	
Is the scheme intended for use by one employer or more than one employer?	One employer
Is the scheme intended for use only by employers that are part of the same corporate group or structure?	Not applicable
Does each employer have a trustee on the trustee board?	Not applicable
Are all employers part of a similar industry, profession or affinity organisation (such as trade body, business group etc)?	Not applicable

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8. Auto-enrolment details

Automatic Enrolment	
One or more employers using the scheme have passed the staging date above?	Yes
Has any employer used this scheme on or after 6 April 2015 to meet their automatic enrolment duties in respect of any staff who were automatically enrolled or opted into the scheme?	No
Has any employer used this scheme on or after 6 April 2015 to meet their employer duties in respect of any staff who did not have to be automatically enrolled or given the opportunity to opt in because they were existing members of the scheme?	No

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9. Service provider details

Insurance company

There is currently no insurance company listed as involved with this scheme. Details required are name, address, whether the insurer carries out the main administration of the scheme and, optionally, an insurer reference (e.g. scheme number), telephone number and email address.

Third party administrator

Name of administrator	Pension Practitioner
Address of administrator	Office 12 Venture Wales Building Pentrebach MERTHYR TYDFIL Mid Glamorgan CF48 4DR United Kingdom
Telephone number	08006344865
Email address	info@pensionpractitioner.com

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10. Contact details

Scheme contact details	
Name of contact	Mrs Georgina Martin
Address of contact	C/o Pension Practitioner Office 12, Venture Wales Building Pentrebach MERTHYR TYDFIL Mid Glamorgan CF48 4DR United Kingdom
Telephone number	08006344862
Email address	info@pensionpractitioner.com

Levy contact details	
Name of contact	Miss Emily McAlister
Address of contact	C/o Pension Practitioner Office 12, Venture Wales Building Pentrebach Merthyr Tydfil CF48 4DR United Kingdom
Telephone number	08006344862
Email address	info@pensionpractitioner.com

Pension Tracing Service contact details	
There is no pension tracing service contact associated with this scheme.	

Consent to electronic service details	
Confirmed by contact name	Miss Emily McAlister
Confirmed date	11/11/2020
Email address	info@pensionpractitioner.com

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