

Your scheme details:

**Mersey 55 Retirement Scheme**

## 1. Introduction

The following are the details that were on the scheme return submitted on 09 October 2019 01:26 PM.

The scheme return details were confirmed by Miss Emily McAlister.

## 2. Scheme details (basic)

| Basic details                |   |
|------------------------------|---|
| Scheme name                  | Mersey 55 Retirement Scheme   |
| PSR number                   | 12008017  |
| Scheme address               | C/O Pension Practitioner<br>Office 12<br>Venture Wales Building<br>Pentrebach<br>Merthyr Tydfil<br>CF48 4DR<br>United Kingdom |
| Billing address              | Same as scheme address  |
| Scheme type                  | Occupational  |
| Benefit type                 | Defined contribution  |
| Current status               | Open to new members since 18 September 2013   |
| Scheme year-end (DD/MM)      | 05/04 since 18 September 2013   |
| HMRC reference number (PSTR) | 00803335RV  |

PSR number: 12008017

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

| <b>Small scheme details</b>           |     |
|---------------------------------------|-----|
| The scheme has fewer than 12 members? | Yes |
| All members' trustees/directors?      | Yes |
| Unanimous/independent decisions?      | Yes |

| <b>Number of members as at 5 April 2017</b><br><b>The Pensions Regulator requires to know the number of members present at the scheme year-end between the dates 1 April 2017 and 31 March 2018.</b> |   |
|--|---|
| Active members   | 0 |
| Deferred members   | 5 |
| Pensioner members  | 2 |
| Total members  | 7 |

| <b>Number of members as at 5 April 2018</b><br><b>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.</b> |   |
|--|---|
| Active members   | 0 |
| Deferred members   | 4 |
| Pensioner members  | 3 |
| Total members  | 7 |

| <b>Age Profiling</b> |                 |                    |
|----------------------|-----------------|--------------------|
|                      | <b>50 to 59</b> | <b>60 and over</b> |
| Active and deferred  | 2               | 0                  |

| <b>Scheme Leavers as at 5 April 2018</b><br><b>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.</b> |    |
|--|----|
| Any scheme leavers during the latest membership year   | No |

PSR number: 12008017

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

| Scheme assets and contributions as at the latest membership effective date of 5 April 2018. |            |
|---|------------|
| Total net assets  | £307942.00 |
| 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      |

PSR number: 12008017

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at [exchange@thepensionsregulator.gov.uk](mailto:exchange@thepensionsregulator.gov.uk)

## 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 2019 |
| 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 2019 |
| What percentage of this data have you assessed to be present and accurate?           | 100%       |

PSR number: 12008017

**6. Trustees**

| Trustee                 |   |
|-------------------------|---|
| Name of trustee         | Mr Stephen Paul Robinson  |
| Chair of trustees       | No  |
| Type of trustee         | Employer-appointed trustee  |
| Professional trustee    | No  |
| Address of trustee      | 11 Stag Way<br>FAREHAM<br>Hampshire<br>PO15 6TW<br>United Kingdom |
| Direct telephone number | 08006344862   |
| Direct email address    | info@pensionpractitioner.com                                      |

| Trustee                 |   |
|-------------------------|---|
| Name of trustee         | Mrs Tracy Joan Howard                                 |
| Chair of trustees       | No  |
| Type of trustee         | Employer-appointed trustee                            |
| Professional trustee    | No  |
| Address of trustee      | 4 Serbin Close<br>LONDON<br>E10 6JL<br>United Kingdom |
| Direct telephone number | 08006344862   |
| Direct email address    | info@pensionpractitioner.com                          |

| Trustee                 |  |
|-------------------------|--|
| Name of trustee         | Mr Scott Clayton Nelson  |
| Chair of trustees       | No   |
| Type of trustee         | Employer-appointed trustee   |
| Professional trustee    | No   |
| Address of trustee      | 12 Glover Street<br>CANNOCK<br>Staffordshire<br>WS12 2RS<br>United Kingdom |
| Direct telephone number | 08006344862  |
| Direct email address    | info@pensionpractitioner.com   |

PSR number: 12008017

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at [exchange@thepensionsregulator.gov.uk](mailto:exchange@thepensionsregulator.gov.uk)

| Trustee                 |   |
|-------------------------|---|
| Name of trustee         | Mr Paul Jason Williams  |
| Chair of trustees       | No  |
| Type of trustee         | Employer-appointed trustee  |
| Professional trustee    | No  |
| Address of trustee      | 130 Haldens<br>WELWYN GARDEN CITY<br>Hertfordshire<br>AL7 1DG<br>United Kingdom |
| Direct telephone number | 08006344862   |
| Direct email address    | info@pensionpractitioner.com  |

| Trustee                 |   |
|-------------------------|---|
| Name of trustee         | Mr Peter David Dalton   |
| Chair of trustees       | No  |
| Type of trustee         | Employer-appointed trustee  |
| Professional trustee    | No  |
| Address of trustee      | 29 Reyde Close<br>REDDITCH<br>Worcestershire<br>B97 5RS<br>United Kingdom |
| Direct telephone number | 08006344862   |
| Direct email address    | info@pensionpractitioner.com  |

| Trustee                 |   |
|-------------------------|---|
| Name of trustee         | Mr Nigel Simms  |
| Chair of trustees       | No  |
| Type of trustee         | Employer-appointed trustee  |
| Professional trustee    | No  |
| Address of trustee      | 1 Raven Walk<br>Flitwick<br>BEDFORD<br>MK45 1NH<br>United Kingdom |
| Direct telephone number | 08006344862   |
| Direct email address    | info@pensionpractitioner.com                                      |

PSR number: 12008017

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at [exchange@thepensionsregulator.gov.uk](mailto:exchange@thepensionsregulator.gov.uk)

| Trustee                 |  |
|-------------------------|--|
| Name of trustee         | Mr Jean Frances Jones  |
| Chair of trustees       | No   |
| Type of trustee         | Employer-appointed trustee   |
| Professional trustee    | No   |
| Address of trustee      | 21 Lime Kiln Gardens<br>Bradley Stoke<br>BRISTOL<br>BS32 0DB<br>United Kingdom |
| Direct telephone number | 08006344862  |
| Direct email address    | info@pensionpractitioner.com   |

PSR number: 12008017

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at [exchange@thepensionsregulator.gov.uk](mailto:exchange@thepensionsregulator.gov.uk)



## 7. Employer details

| Employers   |  |
|---|--|
| There are no current employers associated with this scheme. Details required for employers include name and address, whether the employer is the principal employer, whether the employer participates in the scheme and either the Companies House number and/or charities number. |  |

  

| 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 |

PSR number: 12008017

## 8. Auto-enrolment details

| Automatic Enrolment   |    |
|---|----|
| One or more employers using the scheme have passed the staging date above?  | No |
| 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?   |    |
| 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? |    |

PSR number: 12008017

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at [exchange@thepensionsregulator.gov.uk](mailto:exchange@thepensionsregulator.gov.uk)

## 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<br>Venture Wales Building<br>Pentrebach<br>Merthyr Tydfil<br>CF48 4DR<br>United Kingdom |
| Telephone number         | 08006344862   |
| Email address            | info@pensionpractitioner.com  |

PSR number: 12008017

**10. Contact details**

| Scheme contact details |   |
|------------------------|---|
| Name of contact        | Mrs Miriam Azizi  |
| Address of contact     | Pension Practitioner<br>Office 12<br>Venture Wales Building<br>Pentrebach<br>Merthyr Tydfil<br>CF48 4DR<br>United Kingdom |
| Telephone number       | 08006344862   |
| Email address          | info@pensionpractitioner.com  |

| Levy contact details |   |
|----------------------|---|
| Name of contact      | Mrs Miriam Azizi  |
| Address of contact   | Pension Practitioner<br>Office 12<br>Venture Wales Building<br>Pentrebach<br>Merthyr Tydfil<br>CF48 4DR<br>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                        | 09/10/2019                   |
| Email address                         | info@pensionpractitioner.com |

PSR number: 12008017