



Esther S <esther@pensionpractitioner.com>

Mary Buckley - TFC payment

1 message

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5 January 2018 at 11:42

To: Esther S <esther@pensionpractitioner.com>

Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>

Hi Esther,

I have just processed Mary Buckley's TFC payment through the SAGE system for 2 January as that was when she was paid it.

The system has recognised that she is due a tax refund of £77.53 which she will need to claim back from HMRC as this tax has already been paid to them from the pension scheme in this tax year. She will need to call HMRC and advise them that she has been notified by her pension scheme that she is due the tax refund, if she wants to claim it back in this tax year.

Just for a bit of background on this see this link:

<https://www.gov.uk/claim-tax-refund/you-get-a-pension>

The payslip for this payment is now in the scheme file.

If you have any further questions, give me a call.

Kind regards,

Paul Bennett

Senior Pension Administrator



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