Pension Scheme Return & Event Questionnaire

Information required for the pension scheme return

The scheme administrator is required to complete a pension scheme return for the tax year.
We undertake this as part of our pension scheme service to the trustees. The return is over 11 pages long. In addition, there may be an event report due, presently there are over 16 different event reports that may arise.

We have condensed the information needed into a short questionnaire. Please check the appropriate box and return this form to us. If there are any parts of this form that you are unsure of please contact your scheme consultant.

Pension Scheme tax year ending 5th April 2010	**Yes**	**No**
Did the scheme undertake any investments in the scheme year in land, commercial property in the UK or overseas?	✓	
Did the scheme have any interest in residential property or tangible moveable property*?		NO
Did the scheme acquire any shares in the sponsoring employer?		NO
Were there any loans outstanding to a member or person connected** to the member?		NO
Did the scheme acquire any assets from a connected party**, directly or indirectly?		NO
Did any member make any drawings from the scheme in form of expenses, but not as pension income?	YES	
Were there any payments to the employer from the scheme?		NO
Did the scheme acquire any shares in any unquoted companies i.e. not companies listed on a recognised stock exchange?		NO

Additional Questions	**Yes**	**No**
Do you require a trustee meeting ?		NO
If yes, this will be arranged on receipt of the completed questionnaire		

Notes:

*Tangible moveable property includes: Assets that you can touch and move, such as fine wines, machinery, works of art, assets that have a lifespan of less than 51 years e.g. patents.

**A connected party includes: A relative, a partner, co-director, or co trustee.

A connected party may also include a company that does not participate in the scheme but may be connected to you through the associations given above.

Do you have any particular requirements at this time? If yes, please add your comments below:

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Scheme Name: SILVERCREST ASSOCIATES LTD SSAS

Signed: _____ Date: 8.11.2010

Please return this form to Pension Practitioner .Com Limited; you can email this to us at: **post@pensionpractitioner.com** or fax this to **020 8711 2522**

What happens next ?

We will complete the returns to HMRC and if necessary the Pensions Regulator. We may need some further information from you for this. We will then draft your annual report, which will include the member benefit statements, this will also contain a copy of the information issued to HMRC.

This report can be provided at the trustees meeting, this will also give you the opportunity to discuss any requirements or ideas regarding your scheme and our service. If you do not require a trustee meeting then we will only send the trustees report to you.