

Scheme Pays Illustration Request Form

Tax Year 2020/21



M&G Group Pension Scheme

If you are considering using the Scheme Pays facility to pay your Annual Allowance tax charge, please complete and return this form so we can provide an illustration to show how this will reduce your benefits.

Your details – Please confirm your personal details so that we can identify you

1	Your full name:	<input type="text"/>	NI Number:	<input type="text"/>
	Address line 1:	<input type="text"/>		
	Address line 2:	<input type="text"/>	Postcode:	<input type="text"/>
	Email address:	<input type="text"/>	So we can contact you if we have any questions	

Your Annual Allowance tax charge – read the online *Guide* for help

2	Please confirm your 2020/21 Annual Allowance tax charge:	<input type="text"/>
	Amount of the charge you want the Scheme to pay:	<input type="text"/>

Scheme Pays details – please confirm the basis of your illustration request

3	<input type="checkbox"/> I want to use Mandatory Scheme Pays to pay the tax charge above (return by 3 July 2022)
	<input type="checkbox"/> I want to use Voluntary Scheme Pays to pay the tax charge above (return by 6 October 2021)

This is a request for an illustration only and doesn't commit you to using Scheme Pays.

If you plan to use **Mandatory** and **Voluntary Scheme Pays** please confirm the tax charge split.

Mandatory: **Voluntary:** (return by **6 October 2021**)

Tick this box if you are requesting a **Mandatory Scheme Pays** amount of **less than £2,000**, to confirm that your total Annual Allowance tax charge **is more than £2,000**

Retirement date – Are you over 55 and considering retirement within the next 12 months?

4	<input type="checkbox"/> No	<input type="checkbox"/> Yes* (fill in the next box)	Your expected retirement date is:	<input type="text"/>
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**This may affect the deadline by which you need to return your Scheme Pays election form.*

Please return to:

M&G Group Pension Scheme, XPS Administration, Priory Place, New London Road, Chelmsford, CM2 0PP