Business Services Authority

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Telephone number 0300 330 1346

DATE

Dear Sirs

YOUR NAME

EMPLOYEE NUMBER

I understand that some of the tax relief given on pension contributions paid through the payroll may need to be clawed back via my self-assessment or through “Scheme Pays”. To enable me to calculate if I shall owe any such reimbursement of tax I shall need the following information statements starting with 2022:

* My pensionable pay provided by my NHS employer for each fiscal year, which has been used as the basis for the calculation of the pension savings’ growth on each scheme of which I am a member;
* Growth between the years on all schemes of which I am a member including 1995, 2008 and 2015 where applicable regardless of whether or not the Annual Allowance is exceeded;
* The transitional split in 2015 and 2016;
* The growth in the years 2011 to 2022 inclusive as there may be the possibility of unused relief available pertinent to all years.

It is important for me to understand how this growth has been calculated, so I should be grateful for the opening and closing figures for each year with an explanation of **how** these have been calculated. Including, the level of pensionable pay you have used from my employer, the dates these became effective and why there may be differences between opening and closing balances.

I should be grateful if this could be provided as soon as possible but no later than 6 October 2022 to ensure I am in time to meet my statutory obligations to HMRC.

Yours faithfully,