

# Example scheme return 2023

for public service pension schemes (PSPS)



**Please do not complete this document.**

This is an example of the questions in the scheme return and has been created for illustrative purposes only.

# Part 1: Contact details

## 1 Contact name, address, telephone and email

### 1.1 Scheme return contact details

Details of the person The Pensions Regulator should contact if there are questions about this scheme return.

Title

First name(s)

Surname

Correspondence address

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

**1.2 Pension Tracing Service contact**

Details of the person the scheme would like to be used when individuals make use of the Pensions Tracing Service (optional completion).

Title	<input type="text"/>
First name(s)	<input type="text"/>
Surname	<input type="text"/>
Correspondence address	
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
Address Line 5	<input type="text"/>
Postcode	<input type="text"/>
Country	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>

**1.3 Consent to electronic service**

The Pensions Regulator would like to deliver documents by email wherever possible. If you consent to this, please tick the box below. If you do not consent, leave the box unticked.

By ticking this box, I confirm that I am authorised to indicate on behalf of the trustees, managers of the scheme, and/or others receiving notices, notifications and other documents on their behalf, their willingness to receive notices, notifications and other documents electronically from The Pensions Regulator at the email address that I have entered/confirmed for them.

## Part 2: Scheme details

### 2 Scheme name and address

#### 2.1 Full name of scheme

#### 2.2 Address of scheme

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

#### 2.3 Registration and approval details: HMRC Pension Scheme Tax Reference

(An example reference number is: 00123456RL)

### 3. Scheme status

#### 3.1 What is the current status of the scheme?

Tick one box only and provide the relevant date.

Some schemes have more than one benefit structure, each of which may have differing statuses. In this situation, please state the overall scheme status in the following priority order:

1. Open
2. Closed
3. Paid up
4. Winding up
5. Wound up

For example, a scheme has a defined contribution and defined benefit element. The defined benefit element is 'Open', and the defined contribution element is 'Closed'. The status should therefore be provided as 'Open'.

Open to new members

Date open (DD/MM/YYYY):

<input type="text"/>							
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Closed to new members

Date closed (DD/MM/YYYY):

<input type="text"/>							
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Paid up (no further contributions)

Date paid up (DD/MM/YYYY):

<input type="text"/>							
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Winding up

Date winding up commenced (DD/MM/YYYY):

<input type="text"/>							
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Wound up

Date winding up completed (DD/MM/YYYY):

<input type="text"/>							
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#### 3.2 Scheme year-end date

DD/MM

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Date scheme year-end became applicable

DD/MM/YYYY

<input type="text"/>							
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## 4. Membership details

### 4.1 Membership: 1 April 2021 to 31 March 2022

Add the number of members\* in the pension scheme for each of the categories given to each of the relevant boxes. These should be as at the scheme year-end between 1 April 2021 and 31 March 2022. Only count each member once, as defined in section 124 of the Pensions Act 1995.

Active members	<input type="text"/>
Deferred members	<input type="text"/>
Pensioner members	<input type="text"/>
Total members	<input type="text"/>

Priority for apportioning members is:

1. Active member
2. Deferred member\*\*
3. Pensioner member

Date of the scheme year-end applicable for the above figures (DD/MM/YYYY)

<input type="text"/>							
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For example, if a member has both an active and a deferred member record, only count them once as an active member.

\* Exclude any death benefit only members, dependants (spouses and children) and annuitants where the annuity has been bought in the name of the member.

\*\* Pension credit members, where applicable, should be counted as deferred members.

## 5. Record-keeping

These questions relate to the quality of your scheme data, as assessed within the last three years.

### Common data

5.1 When did you last measure your common data?

(MM/YYYY)

     


Not measured in the last three years

5.2 What percentage of this data have you assessed to be present and accurate?

 %

Not available

### Key scheme-specific ('conditional') data

5.3 When did you last measure your key scheme-specific ('conditional') data?

(MM/YYYY)

     


Not measured in the last three years

5.4 What percentage of this data have you assessed to be present and accurate?

 %

Not available

## Part 3: Scheme governance

This section is about governance. You may be required to supply documentary proof of the appointment at a later date.

### 6. Governance details

#### Manager of the scheme

6.1 Role or organisation name

6.2 Correspondence address for the manager of the scheme

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

**6.3 Give details of all the pension board members for this scheme**

**Details of pension board member**

Title	<input type="text"/>
First name (s)	<input type="text"/>
Surname	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Address Line 4	<input type="text"/>
Address Line 5	<input type="text"/>
Postcode	<input type="text"/>
Country	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>

**Who does the board member represent?**

Member

Employer

Independent

Other

**Is this the chair of the pension board?**

Yes

No

## Part 4: Employer details

### 7. Participating employer

#### Participating employer details

A participating employer is any employer whose employees participate in the scheme

Give details of all the participating employers for this scheme.

**7.1 Participating employer's name in full**

**7.2 Participating employer's registered address**

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

**7.3 Organisation type**

<input type="checkbox"/>	Private limited company	<input type="checkbox"/>	Registered charity
<input type="checkbox"/>	Public limited company	<input type="checkbox"/>	College or education institution
<input type="checkbox"/>	Limited liability partnership	<input type="checkbox"/>	Overseas company
<input type="checkbox"/>	Partnership	<input type="checkbox"/>	Government/public body
<input type="checkbox"/>	Sole trader	<input type="checkbox"/>	Other

**7.4 Employer status**

Please provide the current status of this employer. If the exact status is not available, please select the option which most accurately reflects the current status of the employer.

<input type="checkbox"/>	Active	<input type="checkbox"/>	In administration
<input type="checkbox"/>	Active (proposal to strike off)	<input type="checkbox"/>	In liquidation
<input type="checkbox"/>	Dormant	<input type="checkbox"/>	In receivership
<input type="checkbox"/>	Liquidated or dissolved	<input type="checkbox"/>	Company voluntary arrangement

**Effective date**

If you are unsure of the effective date of the current status you may find it using the search facility on the Companies House website

Effective date of evaluation (DD/MM/YYYY)

<input type="text"/>							
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**7.5 Employer contact details**

Please provide an email address for the pensions contact at this employer. A group mailbox (eg pensions@company.com) is preferred over an individual's name (due to transient nature of employees within the workplace).

Email address

**7.6 Employer identifiers**Companies House  
registration numberRegistered  
charity numberEmployer  
Pension Scheme  
Reference (EPSR)

## Part 5: Advisers and service providers

### 8. Insurance company details

8.1 Is there an insurance company for the scheme?

Yes – please give details below

No – please go to question 9

Give details of all the insurance companies for this scheme.

### 8.2 Insurance company details

Insurance company's reference number\* for the scheme (where known)

\*This is the number used by the insurer to identify this scheme. This will generally be a scheme number but may well be a policy or plan number.

8.3 Does this insurer carry out the main administration of the scheme?

Yes

No

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

## 9. Auditor details

9.1 Is there an auditor appointed to the scheme?

Yes – please give details below

No – please go to question 10

Name of firm

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

**Please note:** We only require details of the **MAIN administrator of the scheme**. If you have stated that an insurer carries out the administration you do not need to complete this page. If not, please complete one of the two questions below.

## 10. Third party administrator details

10.1 Is there a third party administrator appointed to the scheme?

Yes – please give details below

No – please go to question 11

### 10.2 Third party administrator details

Name of firm

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

## 11. In-house administrator details

11.1 Is there an in-house administrator appointed to the scheme?

Yes – please give details below

No – end of questions

Name of firm

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

Country

Telephone number

Email address

# How to contact us

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Brighton  
BN1 6AF

<https://www.thepensionsregulator.gov.uk/>

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Pensions education portal



**Example scheme return 2023: Public service pension schemes**

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