



Clumber  
Pension  
Scheme  
Questionnaire

**Insert Company name:**

## **Pension Scheme Questionnaire for completion by the employer**

Under Pensions Act 2008 it is now law to provide employees with a workplace pension scheme. This legislation was known as Auto Enrolment. Therefore:

- a) Have you ever employed any employees and paid them under a Pay As You Earn (PAYE) Scheme? YES/NO

If yes, please provide details of your pension scheme(s) including your Auto Enrolment Scheme in 1-5 below

- b) Have you ever operated any other company pension schemes for any of the Directors or your employees? YES/NO

If yes please provide details in 1-5 below

### **1. Name of Scheme:**

Policy Number:

Pension Scheme Insurer/Administrator:

Pension Scheme Trustees:

Type of Scheme:

e.g. Defined Benefit (Final Salary), Defined Contribution (Money Purchase) or Hybrid

### **2. Name of Scheme:**

Policy Number:

Pension Scheme Insurer/Administrator:

Pension Scheme Trustees:

Type of Scheme:

e.g. Defined Benefit (Final Salary), Defined Contribution (Money Purchase) or Hybrid

### 3. Name of Scheme:

Policy Number:

Pension Scheme Insurer/Administrator:

Pension Scheme Trustees:

Type of Scheme:

e.g. Defined Benefit (Final Salary), Defined Contribution (Money Purchase) or Hybrid

### 4. Name of Scheme:

Policy Number:

Pension Scheme Insurer/Administrator:

Pension Scheme Trustees:

Type of Scheme:

e.g. Defined Benefit (Final Salary), Defined Contribution (Money Purchase) or Hybrid

### 5. Name of Scheme:

Policy Number:

Pension Scheme Insurer/Administrator:

Pension Scheme Trustees:

Type of Scheme:

e.g. Defined Benefit (Final Salary), Defined Contribution (Money Purchase) or Hybrid

**Auto Enrolment**

c) Please list your PAYE Scheme reference number in the format 013/WZ5121A below. This can be found on a P6 or P9 coding notice or a white payslip booklet P30BC.

\_\_\_ / \_\_\_\_\_

d) Please also list your 13 digit PAYE Accounts Office Reference number (found on your HMRC white payslip booklet P30BC):

\_\_\_\_\_

e) Please provide your Auto Enrolment 10 digit letter code which can be found on any letters received from the Pensions Regulator:

\_\_\_\_\_

f) Were any of the above pension schemes set up for Auto Enrolment?      YES/NO

g) If yes, which pension scheme number above?

h) When was your Staging Date for Auto Enrolment?

i) Have you submitted a Declaration of Compliance to the Pensions Regulator 5 months after your Staging Date/Re-Enrolment Date?

j) If so, what date did you last serve a Declaration of Compliance to the Pensions Regulator?

k) Where are your Auto Enrolment records (including member opt outs) stored?

l) Please provide contact details for the individual at the company that was responsible for Auto Enrolment?

In addition to the above, it would be really useful if you could attach copies of any correspondence that you have in relation to the company pension schemes that you operated.

Signed: .....

Print name: .....

Job title: .....

Date: .....