

Pension Services

We offer all of the audit and accountancy services required by both 'Final Salary' and 'Defined Contribution' pension schemes.

Our client base includes the hybrid plans known as SSAS (Small Self Administered Scheme) and FPT's (Family Pension Trusts). Where applicable we also complete the scheme's Tax Return which can be the means whereby any tax deducted at source on investment income is refunded.

Data is also collated and supplied to the Pension Scheme Administrator to enable them to complete the Scheme Occupational Pension Schemes Return or Non-Occupational Pension Schemes Return.

We also offer other accounting services such as the independent external auditor's report for Registered Pension Schemes Relief at Source annual claim form APSS106. The full list of services is set out in the main advice areas.

What are the costs?

The initial meeting with John Blakey or Ian Rodd is without cost or obligation. The fee is calculated based on the level of work anticipated. A quote will be provided but the charge could be more if more work is encountered than expected. Clients may be charged payments on account throughout the course of the assignment. We always look to agree fees and costs in writing before proceeding.

Main Advice Areas

- Pension scheme audits both statutory and non-statutory
- Pension scheme contribution audits
- Pension scheme accounting
- Tax returns for pension schemes
- Accounting and tax services for unapproved pension schemes
- Pension Tax Relief At Source annual claim audits
- SIPP property syndicate accounting
- Employer covenant assessment
- Affordability reviews

All successful relationships start with a conversation...let's talk.

Ward Goodman
always offers
**FREE INITIAL
APPOINTMENTS**

Team Leaders



IAN RODD
Managing Director



JOHN BLAKEY
Department Manager
Pensions & Charities

Why Ward Goodman?

- Friendly, client focused service
- Department manager with many years of experience in the field of pension auditing and accounting
- A good list of professional contacts within the pension industry for assistance with technical matters
- Service tailored to the client's needs

Make an appointment

ADDRESS

4 Cedar Park, Cobham Road
Ferndown Industrial Estate
Dorset BH21 7SF

PHONE

01202 875 900

FAX

01202 876 288

EMAIL

john.blakey@wardgoodman.co.uk

WEBSITE

www.wardgoodman.co.uk/pension