**Apply for the appointment of a trustee (under section 7(5A) of the Pensions Act 1995)**

## About this form

* Before completing this form, please read our third-party application guidance which contains essential information about making an application.
* Failure to provide all the required information in this form will mean we cannot progress your application.
* Providing your email address confirms to us that you are happy to communicate with us via email.
* If you do not provide an email address, we will write to you by post.

## Part A – applicant and scheme details

|  |  |  |
| --- | --- | --- |
|  | Your full name |  |
|  | Postal address |  |
|  | Email address |  |
|  | Company name if the applicant is a company |  |
|  | Company registration number |  |
|  | If you have a lawyer representing you in this application, please provide their:   * name * postal address * email address |  |
|  | Name of the scheme to which you wish a trustee to be appointed |  |
|  | Pension Scheme Registration Number  (or Pension Scheme Tax Registration Number if not available) |  |
|  | Scheme type:  For example: defined benefit, defined contribution, mixed benefit or self-administered small scheme |  |
|  | Name of sponsoring employer |  |
|  | What is your relationship to the scheme to which you wish a trustee to be appointed?  (Applications under s7(5A) can only be made by a trustee, member or statutory employer) |  |
|  | If you are a member of the scheme, please provide evidence of this (for example your enrolment documentation or an annual benefit statement) |  |
|  | Please provide the following information for all the current trustees of the scheme:   * full name * address * email address |  |
|  | If you are a trustee of the scheme, please provide a copy of the trust deed and rules currently in force for the scheme.  (If you do not have these you may be able to obtain a copy from the scheme administrator) |  |

## Part B – application details

|  |  |  |
| --- | --- | --- |
|  | Please indicate here if you are applying under s7(3(a) or section 7(3)(c) of the Pensions Act 1995, or both?  Note that:  Applications under s7(5A) can only be made under sections 7(3)(a) and section 7(3)(c)  Section 7(3)(a) permits TPR to appoint a trustee where it is satisfied that it is reasonable to do so in order to secure that the trustees as a whole have, or exercise, the necessary knowledge and skill for the proper administration of the scheme.  Section 7(3)(c) permits TPR to appoint a trustee where it is satisfied that it is reasonable to do so in order to secure the proper use or application of the assets of the scheme. |  |
|  | If you are applying under section 7(3)(a) set out:   * why you consider the trustees as a whole do not have, or are not exercising, the necessary knowledge and skill to properly administer the scheme * provide a copy of all the evidence you are relying on in support of your views |  |
|  | If you are applying under section  7(3)(c) set out:   * why you consider the assets of the scheme are not being properly used or applied * provide a copy of all the evidence you are relying on in support of your views |  |
|  | Do you wish the appointed trustee to act to the exclusion of, or alongside, the other trustees?  Please give the reasons for your answer |  |
|  |  |  |

## Part C - Confirmation by applicant

|  |  |  |
| --- | --- | --- |
|  | I confirm that the contents of this application and the information provided with it are true to the best of my knowledge and belief. I understand that anyone who knowingly or recklessly provides TPR with false or misleading information may be liable to a criminal sanction, or a financial penalty, under sections 80 and 80A of the Pensions Act 2004. | |
| Name of applicant:  Signature of applicant:  Date: |  |
|  | | |
|  | | |

## Appendix – How to submit this application

This application form and any documents provided with it should be clearly labelled and emailed to [customersupport@tpr.gov.uk](mailto:customersupport@tpr.gov.uk)

Make sure that any documents you send to us by email do not exceed 20MB per email. If the documents you wish to send exceed this limit, send them in more than one email or send a zip file.

Alternatively, and only where email is not possible, hardcopies can be posted to:

Customer Support

The Pensions Regulator

Telecom House

125-135 Preston Road

Brighton

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