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SCHEDULE 3

Regulation 2(c)

AMENDMENTS TO FORM 3

1. In question 3.13, against the entries for both “Attendance allowance” and “Disability living allowance”, insert “**Note 26C**”.

2. In questions 3.35 and 3.37—

(a) in the entry for “Occupational or private pension plan payments”—

(i) for “private pension plan payments”, substitute “personal pension scheme contributions”; and

(ii) against the entry, insert “**Notes 41A and 41B**”; and

(b) after that entry, insert—

Retirement annuity contract contributions:	£.....	£.....	Note 41C
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3. After question 3.35, insert—

3.35A Have you, or has your partner, received an advance of earnings, or a loan, from an employer in the last 12 months?

Yes (Go to 3.35B)

No (Go to 3.36)

3.35B Please give details, including whether the advance or loan has been spent:

You

Your partner

.....
.....

.....
.....

4. For questions 3.40 and 3.41(1), substitute —

(1) Question 3.41 was amended by S.I.1995/839.

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3.40 Do you or your partner receive a pension or retirement annuity of any kind? **Note 43A**

You	Yes	<input type="checkbox"/>	(if yes for either, go to 3.41)	No	<input type="checkbox"/>	(if no for both, go to 3.41A)
Your partner	Yes	<input type="checkbox"/>		No	<input type="checkbox"/>	

3.41 Please give details of all pensions and retirement annuity payments received by you or your partner **Notes 40, 43A and 44**

	You		Your partner		
	Amount	How often paid	Amount	How often paid	
Occupational pension	£.....	£.....	Note 41A
Pension for victims of National Socialist persecution	£.....	£.....	Note 44A
Personal pension	£.....	£.....	Note 44B
Retirement annuity	£.....	£.....	Note 43A
Retirement pension	£.....	£.....	

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	You		Your partner		
	Amount	How often paid	Amount	How often paid	
Serviceman's widow's supplementary pension	£.....	£.....	Note 44C
War disablement pension (or compensation for the non-payment of such a pension)	£.....	£.....	Note 44D
War widow's pension (or compensation for the non-payment of such a pension)	£.....	£.....	Note 44D
Widow's armed forces pension (or compensation for the non-payment of such a pension)	£.....	£.....	Note 44E
Widow's payment under the Dispensing Instruments	£.....	£.....	Note 44F
Widow's pension	£.....	£.....	
Widow's pension at the supplementary rate under the Personal Injuries (Civilians) Scheme	£.....	£.....	Note 44G
Any other pension(s)	£.....	£.....	
	£.....	£.....	

3.41A Are you or your partner aged 60 or over?

You	Yes	<input type="checkbox"/>	(if yes for either, go to 3.41B)	No	<input type="checkbox"/>	(if no for both, go to 3.42)
Your partner	Yes	<input type="checkbox"/>		No	<input type="checkbox"/>	

3.41B Do you or does your partner belong to a personal pension scheme or retirement annuity contract scheme under which you or your partner receive no income or forego income?

Notes 41B and 41C

You	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Your partner	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

(For each such scheme, you or your partner (as appropriate) should sign the relevant **Authorisation** at the end of Section A of Part 3.)

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5. In question 3.43—

- (a) delete the entries for “Invalidity benefit” and “Sickness benefit”; and
- (b) insert in the appropriate place—

Incapacity benefit	£.....	£.....
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6. In question 3.45(2), in the entry entitled “Annuities”—

- (a) after “Annuities”, insert “(other than under a retirement annuity contract)”; and
- (b) against the entry, insert “**Note 41C**”.

7. In question 3.49, for “**Notes 51 and 52**”, substitute “**Notes 51 and 51A**”.

8. Against question 3.52A(3), insert “**Note 51B**”.

9. In question 3.52B(4), insert at the end —

The care is provided in a school or establishment exempted from registration under the Children Act 1989

Note 52

10. At the end of Section A, for “**NOW GO TO PART 4**”, substitute—

(2) Question 3.45 was amended by S.I. 1995/839.
(3) Question 3.52A was inserted by S.I. 1995/839.
(4) Question 3.52B was inserted by S.I. 1995/839.

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AUTHORISATION
(For persons answering “Yes” to question 3.41B)

Where you or your partner answered “Yes” to question 3.41B, the Council may wish to obtain from the pension fund holder the following further information about your or your partner’s personal pension scheme or retirement annuity contract:—

- (a) where the purchase of an annuity under a personal pension scheme has been deferred, the amount of any income which is being withdrawn from the personal pension scheme;
- (b) in the case of—
 - (i) a personal pension scheme where income withdrawal is available, the maximum amount of income which may be withdrawn from the scheme; or
 - (ii) a personal pension scheme where income withdrawal is not available, or a retirement annuity contract, the maximum amount of income which might be withdrawn from the fund if the fund were held under a personal pension scheme where income withdrawal was available,

calculated by or on behalf of the pension fund holder by means of tables prepared from time to time by the Government Actuary which are appropriate for this purpose.

If you or your partner (as appropriate) are content for the pension fund holder to supply this information to the Council, please complete the authorisation below for each scheme or contract at issue.

Name and address of pension fund holder:

Reference or policy number identifying the personal pension scheme or retirement annuity contract:

For the purpose of this application, I consent to my pension fund holder supplying to the Council the above information in respect of my personal pension scheme/retirement annuity contract* identified above.

(*Please delete as appropriate)

Signature: Date:
Name (in capitals):
Address:

NOW GO TO PART 4

11. For question 3.54, substitute—

3.54 Is the application made in respect of the residence house of an ecclesiastical benefice?

Yes

No (Go to 3.57)

12. After note 26B(5), insert—

“26C. You should answer “Yes” to this question if payment of this benefit to you or your partner has been suspended, or if the amount of the benefit has been reduced because you or your partner are receiving free in-patient treatment within a hospital or similar institution (but not a prison or youth custody institution).”

13. After note 41, insert—

(5) Note 26B was inserted by S.I. 1995/839.

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41A. “Occupational pension” means any pension or other periodical payment under an occupational pension scheme but does not include any discretionary payment out of a fund established for relieving hardship in particular cases.

41B. “Personal pension scheme” has the same meaning as in section 191 of the Social Security Administration Act 1992 and, in the case of a self-employed earner, includes a scheme approved by the Board of Inland Revenue under Chapter IV of Part XIV of the Income and Corporation Taxes Act 1988.

41C. “Retirement annuity contract” means a contract or trust scheme approved under Chapter III of Part XIV of the Income and Corporation Taxes Act 1988.”.

14. At the end of note 42, add—

“If you or your partner work at a school or college or in a job where there are school holidays or similar periods during which you do not or your partner does not work, you should disregard these periods— and any other periods during which you or your partner are not required to work — in calculating the average hours worked per week.”.

15. In note 43, for the words “income tax” to the end, substitute “and income tax, national insurance contributions and net VAT paid. “Net VAT” means the excess of any value added tax paid by you in respect of taxable supplies made to you, over any such tax received by you in respect of taxable supplies made by you, calculated with reference to the previous 12 months.”.

16. After note 43, insert—

43A. “Retirement annuity” means a periodical payment under a contract or trust scheme approved under Chapter III of Part XIV of the Income and Corporation Taxes Act 1988.”.

17. For notes 44 to 44C(6), substitute—

44. Give the net amount if your pension or retirement annuity is taxed.

44A. This means a pension paid to victims of National Socialist persecution under any special provision made by the law of the Federal Republic of Germany, or any part of it, or of the Republic of Austria.

44B. “Personal pension” means a pension or other periodical payment under a personal pension scheme within the meaning of section 191 of the Social Security Administration Act 1992 including, in the case of a self-employed earner, a scheme approved by the Board of Inland Revenue under Chapter IV of Part XIV of the Income and Corporation Taxes Act 1988.

44C. Supplementary pensions are paid to servicemen’s widows, for example: (i) where the widow is aged 40 or over; (ii) where she cannot support herself; or (iii) in respect of certain children of her late husband.

44D. Please mention any analogous pension received from a country outside Great Britain. You should also answer this question if you receive compensation for the non-payment of such a pension, whatever its source.

44E. This means a pension payable to a widow under the Naval, Military and Air Forces Etc. (Disablement and Death) Service Pensions Order 1983 insofar as that Order is made under the Naval and Marine Pay and Pensions Act 1865 or the Pensions and Yeomanry Pay Act 1884, or is made only under section 12(1) of the Social Security (Miscellaneous Provisions) Act 1977 and any power of Her Majesty to make pension provision for or

(6) Notes 44A to 44C were inserted by S.I. 1995/839.

in respect of persons who have been disabled or have died in consequence of service as members of the armed forces of the Crown.

Please mention any analogous pension received from a country outside Great Britain. You should also answer this question if you receive compensation for the non-payment of such a pension, whatever its source.

44F. These payments are made to widows of persons killed before 31st March 1973 on service analogous to service in the armed forces of the Crown.

44G. Under this Scheme, pensions and allowances are paid to or in respect of civilians who were injured or killed in the 1939 – 45 War.”.

18. In note 51, at the end insert “Please mention separately any land for which you receive rent under an existing lease or sub-lease.”.

19. Renumber note 52(7) as 51A.

20. After note 51A, insert—

“**51B.** You should answer “No” to this question where the care is provided by you or your partner for a child named in question 3.20 and one partner charges the other for providing the care.

52. The schools and other establishments referred to, which are exempted from registration under section 71 of the Children Act 1989 by paragraphs 3 and 4 of Schedule 9 to that Act, are:

(a) by paragraph 3 of Schedule 9—

- a school maintained or assisted by a local education authority;
- a school under the management of an education authority;
- a school in respect of which payments are made by the Secretary of State under section 100 of the Education Act 1944;
- an independent school;
- a grant-aided school;
- a grant maintained school;
- a self-governing school;
- a play centre maintained or assisted by a local education authority under section 53 of the Education Act 1944;

where the child concerned is looked after under day care arrangements made by the person carrying on the establishment as part of its activities or by his employee at the establishment authorised to make those arrangements as part of the establishment’s activities; and

(b) by paragraph 4 of that Schedule—

- a registered children’s home;
- a voluntary home;
- a community home;
- a residential care home, nursing home or mental nursing home required to be registered under the Registered Homes Act 1984;
- a health service hospital;

(7) Note 52 was amended by S.I. [1995/839](#).

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— a home provided, equipped and maintained by the Secretary of State; where the child concerned is looked after under day care arrangements made by the department, authority or other person carrying on the establishment as part of its activities or by an employee at the establishment authorised to make those arrangements as part of the establishment’s activities.”.