



pensions archive

Registered Charity Number: 1122633

Preserving pensions history for the future

WHAT IS THE PENSIONS ARCHIVE TRUST?

Please spare a few moments to read this leaflet, about The Pensions Archive Trust (PAT), why our work is important, and how you might help.

The history of pension provision in the UK is very much part of our social heritage, which must be preserved. This is not just a matter of historical interest: understanding history is a vital help in getting the future right. But how was this story to be captured for future generations, with so many changes taking place?

A Steering Committee of concerned pensions professionals was formed in 2002, with a view to progressing this project. As a result, PAT was formed as a company, limited by guarantee in 2005, becoming a registered charity in 2008.

In the meantime, in 2006, PAT entered into a partnership, with the London Metropolitan Archives (LMA), the second largest archive in the UK: this has enabled PAT to identify, preserve and extend a large and diverse range of records, gathered from a wide variety of corporate and individual donors. This increasingly rich vein of information has helped many professionals, academics and others in researching history to address current problems. PAT can also play a valuable part in helping to educate people from a young age about the importance of saving for retirement.

MORE ABOUT THE PENSIONS ARCHIVE TRUST

What can I do? There are various ways in which you can help. You or your company can offer records, information and/or volunteer time to PAT. You can tell your colleagues and friends in the industry about PAT. Perhaps your company might make a corporate donation to PAT? Or you can make a personal donation to PAT – see the next page.

What can I learn from the Pensions Archive? An important purpose of PAT is to be a source of information to the pensions industry. From our archive, you can learn a lot about the history of occupational pensions. You can also learn more about the history and purpose of PAT. You can research specific areas of pensions, either through PAT's own collections, or, via the PAT website, through the pensions information held in many other collections held by LMA.

To access PAT records, contact ask.lma@cityoflondon.gov.uk
For queries about Friends of PAT, contact
malcolm.deering@btinternet.com
For all other questions about PAT, contact
alanherbert@btconnect.com

Where can I start? Go to the PAT website - each month, we have many new and return visitors. If you find yourself talking to a PAT supporter, ask questions of them. They will be happy to chat!

**Do take a look at our website today www.pensionsarchive.org.uk
..... and invite your colleagues and contacts to do the same**



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WOULD YOU LIKE TO BECOME A FRIEND OF THE PENSIONS ARCHIVE TRUST?

Funding of PAT's work relies wholly on the generous sponsorship of a number of organisations connected with the pensions business. We have no income from any other source. But we need more financial support if we are to develop further the scope of the Pensions Archive – for example by digitising more of our records, to make them more easily accessible to a wider audience.

You personally can help by becoming a Friend of PAT, which means you can confirm your interest in our work, without committing to any involvement beyond that. But, of course, you would be kept up to date with developments by way of our periodic newsletters, as well as being invited to attend PAT events.

To become a Friend, we simply ask you to make an annual donation to PAT of at least £25. If you pay that amount by Standing Order (please see the form on page 4) and unless you advise otherwise, we will include your name on our website as a 'Friend of PAT'. Or, if you prefer, you can make that donation by way of a cheque payment.

In either case, please consider making your donation under Gift Aid, by signing the declaration on page 5. This enables PAT to reclaim, from Inland Revenue, an amount equal to 25% of the actual donation, without extra cost to you. If you are a higher tax payer, you can reclaim from the Inland Revenue an amount equal to the difference between the higher and basic tax paid upon your donation. The only requirement is that the total donations under Gift Aid may not exceed the total income tax and capital gains tax you have paid in any tax year.



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STANDING ORDER

To Bank Limited (paying bank)
Address of Bank:
Name of Account:
Account Number:
Sort Code:

Please transfer from my account until further notice to CAF Bank Limited of 2, Kings Hill Avenue, Kings Hill, West Malling, Kent, ME19 4JQ (Sort Code 40 52 40) to the account of The Pensions Archive Trust (Account Number 00094672) the sum of £ (repeat in words) pounds with effect from the day of 201..... and upon the same day in each subsequent year.

Signed by:
Printed name:
Address:
.....
..... Post Code
Date:

OR:

I enclose a cheque for £ in favour of The Pensions Archive Trust.

AND, IF YOU WISH:

Please consider adding to the value of your donations by completing the Gift Aid declaration on page 5.

Data Protection

All personal information is held in confidence and will not be passed on, other than to the Inland Revenue in order to reclaim income tax.

In any case would you kindly add your e-mail address here, please:
.....

This completed page, with the Gift Aid declaration overleaf, if applicable, should be sent to The Pensions Archive Trust, 14 Eleanor Close, Passfield, Liphook, Hampshire GU30 7TX or it may be given to a PAT supporter. Please retain the remainder of this leaflet as a reminder about PAT.

Gift Aid declaration – for past, present & future donations

The Pensions Archive Trust

Please treat as Gift Aid donations all qualifying gifts of money made

Today

In the past 4 years

In the future

Please tick all boxes you wish to apply.

I confirm I have paid or will pay an amount of Income Tax and/or Capital Gains Tax for each tax year (6 April to 5 April) that is at least equal to the amount of tax that all the charities or Community Amateur Sports Clubs (CASCs) that I donate to will reclaim on my gifts for that tax year.

I understand that other taxes such as VAT and Council Tax do not qualify. I understand the charity will reclaim 25p of tax on every £1 that I give on or after 6 April 2008.

Donor's details

Title ----- First name or initial(s) -----

Surname -----

Full home address -----

----- Postcode -----

Date ----- Signature -----

Please notify The Pensions Archive Trust if you:

- *Want to cancel this declaration*
- *Change your name or home address*
- *No longer pay sufficient tax on your income and/or capital gains.*

If you pay Income Tax at the higher or additional rate and want to receive the additional tax relief due to you, you must include all your Gift Aid donations on your Self Assessment tax return or ask HM Revenue and Customs to adjust your tax code.