

Applications to cover additional service for family pensions

Before completing an application covering additional service for family benefits, please detach, retain and read these notes.

Please complete this form using black ink and in BLOCK CAPITALS.

Part A: To be completed by the applicant in all cases.

Qualifying for Family Benefit

Spouses/Children/Civil Partners of male and female members

Survivors of same-sex marriages and civil partnerships are treated in the same way as widows of opposite sex marriages (survivor benefits in relation to service from 1 April 1972 or 6 April 1978 if the marriage was after the last day pensionable service). The benefits for the widower of a female member are based on service from 1 April 1972 or 6 April 1978 if the marriage was after the last day pensionable service), provided that the member died on or after 5 December 2005. If the member died

before 5 December 2005 benefits will be based on service from 6 April 1988. Family benefits in relation to service prior to the appropriate date can be purchased, but it must be within 6 months of getting married or registering a civil partnership for the first time.

Qualifying Partners: All pensionable service under the Teachers' Pension Scheme from 1 January 2007 counts for qualifying partner benefits, as long as the qualifying criteria are met.

1. **Teacher's reference number** (example 99/99999)

/

2. **Surname** (one character per box)

3. **Former surname** (if any)

4. **First name**

5. **Title** (please cross 'X', or state if other)

Mr Mrs Miss Ms Other

6. **Gender** (please cross 'X', or state if other)

Male Female Prefer not to say

7. **Date of birth** (DD/MM/YYYY)

8. **National Insurance number**

9. **Contact address**

Postcode

(continued overleaf)

10. **Home telephone number** (inc. STD code)

11. **Mobile telephone number**

12. **Personal email address**

13. **What is your current relationship status?**

Single/Widow/Widower

Married

Divorced

Civil partner

Partnership dissolved/Revoked

Have a nominated partner

Same sex marriage

Part A: To be completed by the applicant in all cases. (continued)

Section 2: Election to cover service

1. Have you previously made an election to cover service for family benefits? Cross 'X'

Yes No

2. Election to cover service between 1 April 1972 (for male teacher married to a female) and 5 April 1988. Please place an X in one box only to indicate the amount of service you wish to cover.

Option A: All service Option B: Part service

If you have chosen Option B, please state the number of whole years you wish to cover

Years

3. Election to cover service before 1 January 2007 (for qualifying partners).

Option A: All service Option B: Part service

If you have chosen Option B, please state the number of whole years you wish to cover

Years

4. Election to cover service before 1 April 1972 (for a nominated adult beneficiary)

Option A: All service Option B: Part service

If you have chosen Option B, please state the number of whole years you wish to cover

Years

5. Election to cover service before 1 April 1972 (for male teacher married to a female)

Option A: All service Option B: Part service

If you have chosen Option B, please state the number of whole years you wish to cover

Years

(continued overleaf)

Part A: To be completed by the applicant in all cases. (continued)

Paying for previous service

You may choose one of the following methods of payment:

Method A (Periodical payments) Additional contributions will be deducted from salary.

Deductions will begin once you are notified of the acceptance of your election. The higher the percentage rate chosen, the shorter the payment period will be. You may elect to increase the rate of deductions at any time to complete payment earlier. The payment period must be at least one year.

Method B (Single payment) Payment is made as a lump sum, which must be received within three months of you being notified of the amount due.

What will it cost? An estimate of the costs involved can be obtained using the calculation package on the Teachers' Pensions website www.teacherspensions.co.uk

Section 3: Method of Payment

1. Please indicate how you wish to cover your service. You may choose only one method of payment.

Mark an X in one box only:

Method A (monthly deduction from salary)

At least 1 year

Method B: Single Payment

2. If you have chosen Method A, please indicate by entering a cross 'X' in the appropriate box below the percentage rate at which you wish additional contributions to be deducted from your salary.

Section 4: Declaration

- I elect to purchase previous service for family benefits as indicated in Section 2 and Section 3 by the method indicated in Section 4.
- If option B has been chosen in Section 4, I understand that payment by Method B must be made within 3 months of our notification of the amount due.

- I have no reason to believe that my health prevents me from continuing in pensionable employment until the payment period is completed.
- **I understand that this election is irrevocable.**
- All the information I have given on this form is true to the best of my knowledge and belief.

Date (DD/MM/YYYY)

Signature

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Part B: To be completed by the employer and returned without delay.

Notes: Please supply service and salary details in the table below for the previous financial year and the current year. No lines of service details should span 31 March. For members who are in concurrent service in addition to recording the service below please also provide a breakdown of this service on a separate

sheet. When a **part-time salary** entry is made below, **the amount of salary actually paid** to the teacher should be entered and a new line used when a change in the full-time annual rate occurs. An entry should also be made in the special classes column for part-time members.

Section 1: Employment details

1. Establishment number

/

2. Teacher's reference number

/

3. Is the teacher currently in full-time or part-time employment? Place an 'X' in one box.

Full-time Part-time

4. Will the salary be subject to a retrospective increase?

Yes No

Please include details for the previous Scheme year (01 April - 05 April, 06 April - 31 March) and the current year, up to the last day of pensionable employment.

Note: For annual allowance calculations Teachers' Pensions need to know the pensionable earnings in each tax year, hence the requirement to provide service and pensionable earnings details for 01 April - 05 April separately.

Please DO NOT submit lines with a start and end date spanning 31 March; this will result in delays in processing the application.

When splitting the service year (e.g 01 April - 05 April, 06 April - 30 April), please ensure that the actual part-time salary paid is the pensionable earnings in the period, not the annual part-time earnings.

Please use the example table below as a reference to complete the table overleaf.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)
FT	123	4567	01/04/19	05/04/19	1/1	27,000					
FT	123	4567	06/04/19	30/04/19	1/1	27,000					W
PTR	123	4567	01/05/19	31/05/19	2/1	25,000	1,000				
PTR	123	4567	01/06/19	30/06/19	2/1	25,000		30		50	W
PTIC	123	4567	01/07/19	31/07/19	3/1	25,000	500		100		

Full-time/Part-time Indicator - Full-time (FT), Part-time Regular (PTR) and Part-time Irregular (PTIC)

Start date and End date - both dates should be in the same calendar month

Role Identifier - this should be provided by MCR employers only and contain a forward slash separating the contract from the role (for example 1/1)

Part-time Earnings - should be the actual part-time earnings for the period stated in the service line

Days Excluded - should only be provided if the member has not worked in the period stated

Additional Pensionable Payments - include Bonus and Out of School Learning Activity (OSLA) payment

Overtime - paid in the service period stated

Withdrawn - a 'W' should be provided where the member has left the Role Identifier contract provided.

Part B: To be completed by the employer and returned without delay. (continued)

Certificate

The certificate must be signed by a responsible officer of the Local Authority in respect of all maintained schools including both foundation and voluntary aided schools. In the case of other institutions, the certificate must be signed by a responsible officer or chairperson of the governing body. This cannot be a member of the teaching staff.

- | | |
|---|---|
| 1. Name of authorised officer (in capital letters) | 6. Fax number |
| 2. Position | 7. Email address |
| 3. Telephone number (inc. STD code and extn.) | 8. Date (DD/MM/YYYY) |
| 4. Name of contact for admin purposes (in capital letters) | 9. Signature of authorised officer |
| 5. Telephone number (inc. STD code and extn.) | |

Please return to us at: Teachers' Pensions, 11B Lingfield Point, Darlington, DL1 1AX.

Please read the accompanying notes before completing this form.

Notes

Short term pensions

If you die in service or within a year of leaving due to ill health (but haven't received ill-health benefits under the Teachers' Pension Salary) a short-term pension may be paid to your beneficiary for three months at the rate of your final salary. There's also an equivalent short-term pension payable for one or more eligible children, paid concurrently.

Other things you should know about short-term pensions:

- If you die after retirement, a short-term pension (payable for 3 months at the rate of your final pension) is only payable if a long-term pension(s) is due to be paid. An equivalent short-term pension payable for one or more eligible children, paid concurrently, is also available.
- If there's no spouse, civil partner, nominated dependent relative or qualifying partner but one or more eligible children, a short-term pension would be paid for six months at the rate of your final salary or pension.

Adult's pension

Your beneficiaries will get a pension if you have at least 2 years' service covered for family benefit. It is calculated at the rate of 1/160 of your average salary for each year of family benefit service. If all your service counts for family benefit, it'll be half of your pension. If you haven't covered all your service it'll be a smaller proportion. A pension is payable for life if you had pensionable service on or after 1 January 2007.

Children's pensions

Children's pensions are payable for:

- Children under 17 years of age or who are under 23 and receiving full-time continuing education or training lasting at least 2 years (where the annual rate of pay relating to the training course does not exceed a certain level, currently £2757.00) without a break of more than 1 academic year; or
- Children who are incapacitated and dependent upon you when you die. If an adult pension is payable children's pensions are payable based on all pensionable service under the TPS from 1 April 1972.

If there's no pension payable to an adult, a higher rate of child's pension may be payable.

Where an adult pension is payable, the calculation of pension for one child is:

$$\frac{\text{Pension} = \text{Average salary (at retirement)} \times \text{family benefit service}}{320}$$

Where an adult pension is payable, the calculation of pension for 2 children or more is:

$$\frac{\text{Pension} = \text{Average salary (at retirement)} \times \text{family benefit service}}{160}$$

This amount is to be divided equally amongst however many children there are.

Where no adult pension is payable, a higher rate of service may be applicable (to be determined at the time of death). The calculation of pension for 1 child is:

$$\frac{\text{Pension} = \text{Average salary (at retirement)} \times \text{family benefit service}}{240}$$

Where no adult pension is payable, the calculation of pension for 2 children or more is:

$$\frac{\text{Pension} = \text{Average salary (at retirement)} \times \text{family benefit service}}{120}$$

This amount is to be divided equally amongst however many children there are.

Index linking of family pensions

Family pensions are increased annually in line with rises in the cost of living.

Increasing the value of family pensions

Your qualifying service determines the rate of your pension. So if you want to increase your pension, you'll need to purchase all or part of your earlier service. You can only make an election to do this:

- within 6 months of returning to pensionable employment if you've not been employed for any continuous period of 6 months from 26 June 1973 (male married to female), 1 October 1988 (other marriage, female to male, male to male, and female to female.) or from 5 December 2005 (for civil partner's pensions);
- within 6 months of your marriage or civil partnership registration;
- within 6 months of returning to pensionable employment if you married or registered a civil partnership while not employed;
- within 6 months of becoming a qualifying partner.

(continued overleaf)

Please read the accompanying notes before completing this form.

Notes

Please read these notes before completing form 'Reinstating previously withdrawn contributions'. Please retain this page.

- 1.** You may elect to repay any contributions you previously withdrew from the Teachers' Pension Scheme (TPS) provided the contributions were withdrawn before 1 June 1973. You must currently be in pensionable employment (i.e. paying teachers' pension contributions), or in comparable British service (i.e. paying teachers' pension contributions under the schemes operating in Scotland or Northern Ireland).
- 2.** If you are currently in pensionable re-employment after retiring from the Teachers' Pension Scheme you are not eligible to repay any withdrawn contributions.
- 3.** When contributions are repaid to the scheme the original period of service is restored as being pensionable service in the Teachers' Pension Scheme and will be used in any future calculations.
- 4.** The basic amount to be repaid is the gross amount of contributions previously withdrawn, together with compound interest at 3.5% per annum calculated to the expected payment date.
- 5.** The following method of payment will be used: a single lump sum – in all cases where the total amount to be repaid is less than £500. This must be paid within 10 weeks of the election being accepted;
- 6.** Tax relief may be obtained from His Majesty's Revenue & Customs (HMRC) in respect of the reinstated contributions. You will need to contact your local inspector of taxes directly.
- 7.** Once you have completed the application form, you should forward it to your employer. Your employer will complete Part B and forward your application to Teachers' Pensions.

If you require any further information please visit the Teachers' Pension Scheme website at **www.teacherspensions.co.uk**
Alternatively telephone the Teachers' Pension Scheme on **0345 606 6166**. Minicom (for those with hearing disabilities) **0345 609 9899**. Please quote your teacher's reference number or National Insurance number.

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The DfE may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to **www.teacherspensions.co.uk/public/privacy**.

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