

Notification of partner

If you are married or in a civil partnership your spouse or civil partner will automatically receive your pension in the event of your death so you do not need to nominate them. This form relates to members who are not married or in a civil partnership but have been in an exclusive mutual relationship for at least two years. Only service on or after 1 January 2007 will count towards a qualifying partner's benefits, although you can pay for earlier service to count towards their benefits by making an application to cover additional service for family benefits. Such an application needs to be made within 6 months of entering into the relationship. Please read the accompanying notes. Surviving qualifying partners will also be considered without a nomination.

Part A: To be completed by the applicant.

Notes: You can notify us of your partner who you wish to receive a pension from the Teachers' Pension Scheme (TPS) after your death – but you will need to meet certain conditions. Complete the form and send it to Teachers' Pensions.

Section 1: Personal details

1. **Teachers' Pensions Reference number** (example 99/99999) /
2. **Surname** (one character per box)
3. **Former surname** (if any)
4. **First name**
5. **Title** (please tick, or state if other)
Mr Mrs Miss Ms Other
6. **Date of birth** (DD/MM/YYYY)
7. **National Insurance number**
8. **Contact address**
- Postcode
9. **Home telephone number** (inc. STD code)
10. **Mobile telephone number**
11. **Personal email address**

Section 2: Notification

Please provide contact details for your partner.

2. **Surname** (one character per box)
3. **Former surname** (if any)
4. **First name**
5. **Title** (please tick, or state if other)
Mr Mrs Miss Ms Other
6. **Date of birth** (DD/MM/YYYY)
7. **National Insurance number**
8. **Contact address**
- Postcode

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

Section 3: Declaration

- We are living together and our financial affairs are interdependent or my partner has been financially dependent on me;
- We have a committed relationship with each other and we intend to continue this indefinitely;
- We are mutually responsible for each other's welfare;
- We are not related in a way that will prevent either marriage or civil partnership;
- Neither of us is married to or in a civil partnership with anyone else; If you or your partner have divorced or dissolved a civil partnership, please can you send through a certified copy of the decree absolute document(s).
- Neither my partner nor myself expect to be treated as a qualifying partner of another member of the Teachers' Pension Scheme;
- We have read the accompanying notes;
- I understand that benefits will not be paid unless satisfactory evidence is provided when I die. I understand that it is my responsibility to review my nomination to keep it up to date.

We have lived together for years

Member's signature

Partner's signature

Date (DD/MM/YYYY)

Date (DD/MM/YYYY)

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

Notes

The payment conditions that must be met at the time of death are:

- You must have pensionable teacher service after 31 December 2006;
- You and your qualifying partner must have been living together in an exclusive committed long-term relationship for at least 2 years;
- You must not be married or in a civil partnership. If you or your partner have divorced or dissolved a civil partnership, please can you send through a certified copy of the decree absolute document(s).
- Your qualifying partner is financially dependent on you or you are financially interdependent. Please note, we will test financial interdependency when you die.
- You must have sufficient relevant service to qualify for partner benefits. Please see below.

Financial interdependency means you have joint finances. It doesn't mean that you need to be contributing equally. Evidence of financial interdependency could include confirmation that:

- You live in a shared household
- You share household spending
- You have shared bank accounts or investments
- You have a loan or mortgage in joint names
- Your wills name each other as the main beneficiary
- You hold mutual power of attorney
- Your qualifying partner is nominated as the main beneficiary of your life assurance

You must provide three pieces of evidence to show financial interdependency

Remember, neither you nor your qualifying partner can be married to, or in a civil partnership with, anyone else.

We'll pay a pension to a surviving partner provided that you have two years in the scheme from 1 January 2007. We'll also pay if you were in service on or after 1 January 2007 and have covered a minimum of two years previous teaching service for family benefits. You can cover previous teaching service within six months of nominating your partner for family benefits by paying extra contributions.

Your qualifying partner will receive their pension for the rest of their life, even if they enter into a new relationship after you die. Their pension will be paid each month and it will be increased every April to reflect increases in the cost of living.

We'll also pay a lump sum death grant if you die before you retire. You can nominate whoever you like to receive the death grant. If you die while you're still contributing to the scheme, we'll usually add on some extra years of service (we call this a 'service enhancement') when calculating your qualifying partner's pension. If you die after retirement or after leaving the scheme, your qualifying partner's pension will be worked out in the same way, but there will be no service enhancement.

When you die your partner should notify Teachers' Pensions and complete a claim form. They'll be asked for information supporting their claim to a partner's pension. This is requested at the time of your death rather than at the date of your declaration. We need to be sure that you continue to meet the conditions for nominated partners. So if your circumstances force you to spend your final years away from home, for example, in residential nursing care, this will be taken into account.

Guide to relationships that are not allowed to marry in the UK

Note: This list is based on the statutory list in the Marriage Act 1949, (section 1, Schedule 1) and the Civil Partnership Act 2004 (Schedule 1) and apply to England and Wales and is updated in respect of the Same Sex Marriage Act 2013. Slightly different restrictions apply in Scotland. The statutory list may change so the following list is only a guide.

A man may not marry his:

- mother, adoptive mother, former adoptive mother;
- daughter, adoptive daughter, former adoptive daughter;
- grandmother;
- granddaughter;
- sister / half-sister;
- aunt; or
- niece.

A man may not enter into a civil partnership with his:

- father, adoptive father, former adoptive father;
- son, adoptive son, former adoptive son;
- grandfather;
- grandson;
- brother/half brother;
- uncle; or
- nephew.

A woman may not marry her:

- father, adoptive father, former adoptive father;
- son, adoptive son, former adoptive son;
- grandfather;
- grandson;
- brother / half-brother;
- uncle; or
- nephew.

A woman may not enter into a civil partnership with her:

- mother, adoptive mother, former adoptive mother;
- daughter, adoptive daughter, former adoptive daughter;
- grandmother;
- granddaughter;
- sister / half-sister;
- aunt; or
- niece