

Flexibilities Application - Career Average Scheme

Please read the notes on how to complete this Flexibilities application form before completing it. This form can also be completed online via your My Pension Online account. Using MPO allows you to track the process of your application.

Teachers' Pensions cannot provide financial advice but you should be aware that if you purchase Additional Pension or Faster Accrual the benefits accrued will be taken into account when assessing your benefits against the Annual and Lifetime Allowances. If you consider that you may need financial advice, it is open to you to consult an Independent Financial Adviser. Please complete this form using black ink and in BLOCK CAPITALS.

Part A: To be completed by the applicant in all cases. Please refer to 'How to complete the Application Form'

Section 1: Personal details

- | | | |
|---|---|--|
| 1. Teacher's reference number (example 99/99999) | 7. National Insurance number | |
| <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0;"></div> | | |
| 2. Surname (one character per box) | 8. Contact address | |
| | | |
| 3. Former surname (if any) | | |
| | | |
| 4. First name | Postcode | |
| | | |
| 5. Title (please cross 'X', or state if other) | 9. Home telephone number (inc. STD code) | |
| Mr Mrs Miss Ms Other | | |
| 6. Date of birth (DD/MM/YYYY) | 10. Mobile telephone number | |
| | | |
| | 11. Email address | |
| | | |

Section 2: Additional Pension

Please enter the details of your option choice below. Please note that Additional Pension can only be purchased in blocks of £250.

An illustration of the costs and payment periods can be obtained from our website www.teacherspensions.co.uk

- | | |
|--|---|
| 1. I wish to purchase an Additional Pension of: | 3. I wish to pay by (please do not send payment with this application) (cross 'X' as required) |
| | A one off payment or |
| | instalments from my salary |
| 2. I wish to purchase an Additional Pension for:
(cross 'X' as required) | 4. If payment is to be made by instalments please state the number of whole years payments are to be made over |
| Personal benefits only or | year(s) |
| Personal benefits and adult dependant benefits | |

(continued overleaf)

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

Section 3: Additional Pension (continued)

If lump sum payment is to be made by the employer, please provide details of where the invoice is to be sent.

Send invoice to:

Postcode

Section 4: Faster Accrual

Please enter employer's name and rate of accrual for each employment. You can choose either 1/45, 1/50 or 1/55. (Please note the standard rate of accrual is 1/57, i.e. you accrue £1 of pension for every £57 of pensionable earnings.)

Please state the contract name if you have more than one contract of employment with the employer you have provided. This will be the job title as it appears on your contract, e.g Head of Department, History Teacher etc.

Employer's name

Contract name

Accrual rate

Section 5: Buy-out of the standard rate of reduction ('AAB Buy-out')

Select either maximum time possible or number of years wanted (max 3 years)

1. Maximum time possible or years

2. Employer's name

(continued overleaf)

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

Section 6: Declaration

- I have read the accompanying notes.
- I am aware that Additional Pension and Faster Accrual elections will be taken into account for calculating the Annual and Lifetime allowances.
- The information given in this form is correct.
- I have no reason to believe that my health prevents me from continuing in pensionable employment.
- I confirm that I am not using money received from any pension arrangements to purchase this flexibility.
- I confirm I am not in breach of the HMRC recycling rules.

Date (DD/MM/YYYY)

Signature

We can process your election, but be advised that because of an ongoing legal case in connection with the way scheme Reform was implemented in April 2015, the election may need to be amended at a future date to align with the agreed benefit structure / Scheme valuation. How it will be amended is dependent upon the outcome.

We'll inform you of the effect on your election as and when we're able to.

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Part B1: To be completed by the current employer.

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.

I confirm that this teacher is or will be in pensionable employment

Date of birth

Actual pensionable earnings / salary figure

Verified? Yes No

Name of officer (in capital letters)

Extension

Position

LEA/establishment number

/

Telephone number

Part B2: To be completed by the current employer for Faster Accrual Elections who provide MCR submissions only.

What is the Role Identifier for the member's contract of employment?

Date

Signature

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Please read the accompanying notes before completing this form.

How to Complete the Application Form

Part A - Members

It is important that you read the Flexibilities factsheets available on our website before completing this application to ensure you understand all the options. These can be found here: <https://www.teacherspensions.co.uk/members/resources/factsheets/managing-your-pension.aspx>

This application is in two parts. Part A is to be completed by you. Part B is to be completed by your employer and returned to you. Both part A and all Part B must be completed and sent to Teachers' Pensions together by you.

Part A – Members

- **Section 1** must be fully completed.
- **Section 2, 4, & 5** only complete the section of the desired flexibility. If you wish to select more than one type of flexibility you can use the same form.
- **Section 2, question 1:** Additional Pension can only be bought in blocks of £250.
- **Section 2, question 3:** must be completed if you wish to pay by lump sum.
- **Section 3:** if the lump sum is to be paid by the employer section 3 must be completed.
- **Section 4:** list all the separate eligible employments for which you want to purchase Faster Accrual. For any eligible employment not listed it will be assumed that the standard 1/57th rate will be applied.
- **Section 4:** enter the rate you want to apply for each eligible employment. A rate must be given for each eligible employment entered in section 4.
- **Section 5, question 1:** if Buy-out is being selected the number of years and months must be entered to specify the amount (length of time) of the standard rate of reduction from age 65 that is being bought out. Maximum of 3 years.
- **Section 5, question 2:** list all eligible employments you currently work for as the employer for each will be required to deduct contributions in respect of the Buy-out election. If you move to a new employer you must ask them to start deducting the appropriate level of contributions, otherwise the election will be treated as revoked from the point you left the previous employment.
- **Section 6:** the form must be signed by you for the application to be considered complete.

Part B - Employers

- By completing Part B, the employer is confirming that the applicant will be in pensionable employment for the coming scheme year during which the Faster Accrual application applies or will apply.
- The employer must verify the applicant's date of birth to proceed with the application.
- The employer must provide the actual pensionable earnings / salary figure that the member will receive in the forthcoming scheme year and not the current year.
- The employer must provide the Role Identifier if the member has completed a Faster Accrual Election and you're providing Monthly Contributions Reconciliation submissions. The Role Identifier is not required for any other elections on this form.
- Each employer for the employments listed in section 4 & 5 must complete a separate Part B.

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