

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

Section 4: Lump sum choices

Notes:

You should read the 'How to Complete the Application Form' notes for Part A section 4 before completing the questions below. **Once your application is received by us, your decision is irrevocable.**

If your post retirement pensionable service is not on or after 1 January 2007, you will receive a lump sum of 3 times the pension arising from your post retirement service, but you do not have the option to give up part of your pension to increase your lump sum.

You should answer all 4 questions in this section. If any question does not apply to you, please tick 'not applicable'.

1. If you are a member of the Scheme prior to 1 January 2007 and with pensionable service on or after this date.

You will automatically receive a lump sum of 3 times your pension. You have the option to take an additional lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**, you can specify the amount per year that you wish to give up or you can indicate that you wish to give up the maximum that is allowed.

Amount per year £
or
Maximum allowed

No Or not applicable

2. If you are a member of the Scheme joining on or after 1 January 2007 with no pensionable service prior to 1 January 2007.

You **will not** automatically receive a lump sum but have the option to take a lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**, you can specify the amount per year that you wish to give up or you can indicate that you wish to give up the maximum that is allowed.

Amount per year £
or
Maximum allowed

No Or not applicable

3. If you are a member of the Scheme joining the Career Average arrangements on or after 1st April 2015.

You **will not** automatically receive a lump sum but have the option to take a lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**, you can specify the amount per year that you wish to give up or you can indicate that you wish to give up the maximum that is allowed.

Amount per year £
or
Maximum allowed

No Or not applicable

(continued overleaf)

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

4. Additional Pension Elections. If you have bought or are buying Additional Pension Elections you have the option to give up part of your Additional Pension to increase your lump sum.
Do you wish to do this?

Yes If yes, please indicate how much of your annual pension **you want to give up**, you can specify the amount per year that you wish to give up or you can indicate that you wish to give up the maximum that is allowed.

Amount per year £
 or
 Maximum allowed

No Or not applicable

Section 5: Other Details

1. Have you been employed by more than one Employer relevant to Teachers' Pensions in the past 12 months?

Yes No

If yes, please ensure that you complete an application form for each Employer so that each Employer completes a Part B of the form. It is acceptable to photocopy the completed Part A for the additional forms.

Please provide names and addresses of each Employer in the box below (continue on a separate sheet if necessary).

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2. Lifetime Allowance - For more information regarding Lifetime Allowance assessment please refer to www.hmrc.gov.uk

Will the value of all your annual pensions exceed £45,000?

In assessing this, please use the value of your Teachers' Pension Scheme benefits and other pensions before the conversion of any annual pension to a lump sum.

Yes No

If yes, a further form will be forwarded to you for completion.

Section 6: Payable Date

If you are no longer in pensionable employment when making this application you may select below, the date that benefits are paid. This cannot be earlier than 6 weeks after the date you sign the form. If there is no date selected, or the date is less than 6 weeks after the date you signed the form, then Teachers' Pensions will pay your benefits from 6 weeks after the date you sign the form.

1. Payable date

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(continued overleaf)

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

Section 7: Declaration.

Please ensure you read all of the declaration statements below before you date and sign this section.

- I apply for payment of retirement benefits under the Teachers' Pensions Regulations. I understand that where I am applying for benefits before their Normal Pension Age, and I am not applying for premature retirement benefits, then an actuarially adjusted pension will be paid, and the adjusted pension will be paid for life.
- I confirm, that where I am applying for any retirement benefits before their Normal Pension Age, I will have ceased all teaching employment in England and Wales with effect from the date shown in Section 1 item 12, and any further employment will be subject to a new contract and there will be at least a one day break between contracts, otherwise this application is invalid.
- I confirm, that where I am applying only for retirement benefits on or after their Normal Pension Age, I will have ceased all pensionable employment as a result of either (1) a contractual break in pensionable employment, or (2) opting out of pensionable employment, otherwise this application is invalid.
- I agree to inform Teachers' Pensions of any change to my retirement date or to any other details I've provided on this form.
- I agree to inform Teachers' Pensions immediately if I begin employment in teaching at any time during my retirement. I understand that failure to do this may result in an overpayment of benefits which will be recovered.
- I understand that if my existing benefits and benefits from the Teachers' Pension Scheme exceed the Lifetime Allowance at retirement, and taking account of any transitional protection certificate, the Lifetime Allowance charge will be paid and my benefits reduced.
- I confirm that I am not in breach of Her Majesty's Revenue & Customs (HMRC) recycling rules. For further information please refer to www.hmrc.gov.uk.
- All the information I have given on this form is true to the best of my knowledge and belief.
- I understand that the lump sum choices I have made are irrevocable.
- I certify that this cessation of pensionable employment is the result of a contractual break in pensionable employment, otherwise this application is invalid.

Signature

Date

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(continued overleaf)

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

Section 8: Witness Statement

This section should only be completed when the applicant has been out of teaching for more than 1 year.

- I certify that this declaration was signed on this day, in my presence, by the person who I believe to be the applicant.

Signature

Date

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1. Name

2. Home telephone number (inc. STD code)

3. Contact address

Postcode

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Now ask your Employer to complete Part B before returning the completed form to Teachers' Pensions.

- **Exception: If you left teaching employment more than 1 year ago, please ensure that Part A, section 8 is appropriately witnessed and return to Teachers' Pensions, Mowden Hall, Darlington, DL3 9EE.**

Data Protection Act 1998. 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.**

Please return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 9AX

www.teacherspensions.co.uk

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

This certificate must be completed and signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools, including foundation and voluntary aided schools. In the case of other institutions such as Academies, the certificate must be signed by a responsible officer of the governing body. This cannot be a member of the teaching staff.

Section 2: Certificate

I certify that the service and salary details provided is a true and accurate record of payments made in respect of pensionable employment. I certify that pensionable employment will cease or has ceased on the date provided. I appreciate that the absence of a break in pensionable employment of at least one day will invalidate this application.

1. **Signature of authorised officer**

2. **Name of authorised officer** (in capital letters)

3. **Position**

4. **Telephone number** (inc. STD code and extn.)

5. **Date**

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6. **Name of contact for admin purposes** (in capital letters)

7. **Telephone number** (inc. STD code and extn.)

8. **Fax number**

9. **Email address**

10. **Full address or address stamp**

Please give full address and postcode, or stamp with address

(continued overleaf)

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

Section 2: You should only complete this section if the member is applying for premature retirement.

You should refer to the notes for the Employer for help completing this section.

1. Do you wish Teachers' Pensions to administer the employer's compensation?

- Mandatory Compensation (A)
 Discretionary Compensation (B)
 No

4. Enter the number of added years granted in respect of discretionary premature retirement compensation.

- Years Days
 None
 Not Known

2. If you have ticked (A) or (B), do you wish Teachers' pensions to pay the lump sum?

- Yes Note: If Teachers' Pensions administer the lump sum payment, you will receive an invoice at the time of retirement. No lump sum payment will be made to the applicant until the invoice is settled in full by you.
 No

If over 6 years 243 days, please state the amount of redundancy or termination payments to be made, if any:

£ Specific amount p.a

5. Method of reimbursement of the employers share of the award. (Tick relevant boxes)

- Pay as you go
 Actuarial lump sum
 Actuarial lump sum over 2 to 5 years

3. Have you entered into a contract in the past with Teachers' Pensions to administer either (A) or (B) above.

- Yes No

Specify the number of years you will pay over

(continued overleaf)

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 Darlington, DL1 9AX

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

This certificate must be completed and signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools, including foundation and voluntary aided schools. In the case of other institutions such as Academies, the certificate must be signed by a responsible officer of the governing body. This cannot be a member of the teaching staff.

Section 3: Certificate: You should only complete this section if the member is applying for premature retirement.

I certify that the member is at least 55 on the last day of employment; that the member is leaving employment by reason of redundancy or in the efficient discharge of the employer's functions; that the member will receive mandatory compensation in accordance with regulation 7 of the Teachers' (Compensation for Redundancy and Premature Retirement) Regulations 1997 and has not received compensation under Part III of those Regulations.

Where I have chosen Pay as you go as my preferred payment method then I agree to pay the mandatory element of this for the rest of the member's life and I agree to pay the discretionary element of this for the rest of the member's life and to their eligible dependants.

I agree to pay the Teachers' Pension Scheme the admin charge associated with administering these payments.

1. **Signature of authorised officer**

5. **Full business address**

2. **Date**

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3. **Title** (please tick, or state if other)

Mr Mrs Miss Ms Other

Postcode

6. **Telephone number** (inc. STD code)

Please provide the full name, business address and telephone number of the responsible officer to whom the invoice/ statement of premature retirement benefits may be sent.

7. **Email address**

4. **Full name**

Data Protection Act 1998. 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.**

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11b Lingfield Point,
Darlington, DL1 9AX

www.teacherspensions.co.uk

Please read the accompanying notes before submitting this form.

What Happens Next?

- We will acknowledge receipt of your application form either by letter, email or SMS text. Generally, you will be notified about your benefits before they are due to come into payment.
- Where we hold your email address, we will use this to communicate with you. This will include posting notification of your retirement benefits in the secure area of the website via **'My Pension Online'**. You can sign up to **My Pension Online** at www.teacherspensions.co.uk/register
- You may also monitor the progress of your case in **'Track My Case'** on the website.
- When we process your application, we will check that you have at least 1 year qualifying service for a pension. If we find that you do not have enough service to qualify for pension benefits then you will qualify for a short service annuity award. We will contact you to check if you want this application to proceed on the basis of a short service annuity award.
- Where you are applying for premature retirement and your Employer has chosen Teachers' pensions to administer their lump sum element of your compensation, then Teachers' Pensions will make these payments to you at the time of retirement, but only once your Employer has made their payments to Teachers Pensions.

How to Complete the Application Form

Notes for the applicant

Part A General

You should use this retirement application form when you are applying for AGE, AAB or Premature retirement benefits from additional pensionable service that you have accrued since your previous retirement.

You should NOT use this form if you want to apply for Phased retirement benefits. In this instance you should use the Phased retirement application form.

This application is in two parts. You must complete Part A and send Parts A and B to your Employer. Your Employer must complete Part B and return both parts of the completed application form together to Teachers' Pensions.

Where you have more than one Employer you should complete a form for each Employer (you may photocopy the first completed Part A for additional Employers). Each of your Employers must complete the Part B and return both parts of the completed application form together to Teachers' Pensions.

Complete the form using black ink and BLOCK CAPITALS, please clearly place a tick for answers that use tick boxes.

Part A section 1: Personal details

All of section 1 must be completed.

Teacher's reference number: This is a seven digit number and is your unique teacher reference (you may also know it as your DfE number).

Date of birth: As part of the application process, Teachers' Pensions must verify that a member's age is as given on the application form.

Personal Email address: Please ensure you provide this address as we will use it to send you information about your benefits. You should register on the website www.teacherspensions.co.uk for **My Pension Online** as this is a secure area for communication.

Last date of pensionable teaching employment: This is the last day that you are paid up to. This may be different to the last day you work.

Part A section 2: Payment details

(continued overleaf)

How to Complete the Application Form *(continued)*

Your pension will be paid into the account you nominate in this section, if you are unsure of any of your bank details you should contact your bank who will be able to help you.

We can only make payments into an account, or joint account, that is in your name.

If you want your pension to be paid into a UK account then please complete questions 1 to 5.

If you want your pension to be paid into a non UK account then please complete questions 6 to 8. Please note that payments made to a non UK account will only be paid in the banks local currency.

Part A section 3: Survivor details

Please complete all questions that apply.

Part A section 4: Lump sum choices

Please complete all the questions. If a question does not apply to you, you can tick no/not applicable.

If you wish to give up part of your of your annual pension for a lump sum payment you should tick Yes and complete the appropriate details. You should use the calculators on the website www.teacherspensions.co.uk before making any choices.

If you are applying for benefits in more than one Teachers' Pension Scheme arrangement, then you can take different lump sums from each one.

- Question 1 for arrangements with a Normal Pension Age of 60.
- Question 2 for arrangements with a Normal Pension Age of 65.
- Question 3 for the Career Average arrangements.

If you want to take the maximum lump sum then indicate this in the box alongside 'Maximum Allowed' and do not enter a specific amount. If you know how much of your annual pension you want to give up, please enter this amount alongside 'Specific amount p.a' and do not tick 'Maximum Allowed'.

Do NOT enter the lump sum amount that you wish to receive, this could result in an error and delay the processing of your application.

Visit the calculators on our website to see estimates of the reduction that will be made to your annual pension amount when you choose to take a lump sum.

If you have bought or are buying Additional Pension in the Teachers' Pension Scheme then you have the option to take a lump sum by giving up part of your annual benefit from your Additional Pension. If you wish to do this then complete Question 4.

You cannot use this form to make lump sum choices from AVC's or other pension savings that are not part of the Teachers' Pension Scheme.

Part A section 5: Other details

If you have more than one Employer each Employer must complete part B of the form and they should each be submitted with a copy of part A (It is acceptable to photocopy the first completed Part A for subsequent Employers).

Lifetime allowance: When answering the lifetime allowance question you must include any income from AVC's and non Teachers' Pension Scheme pensions as well as all your Teachers' Pensions, but not your state pension. You can obtain a benefit statement for the Teachers' Pension Scheme using My Pension Online (MPO), please visit our website at www.teacherspensions.co.uk. You can find more information regarding Lifetime Allowance tax changes at www.hmrc.gov.uk.

(continued overleaf)

How to Complete the Application Form *(continued)*

Part A section 6: Payable date

If you have already left teaching when you complete this form, you may select the date that your benefits are payable from. In this case you must choose a date no earlier than 6 weeks after the date you signed from.

Payable date: This will be the day that your pension is due to start from.

Part A section 7: Declaration

Please check your answers and read the declaration before you sign and date the form.

You must sign and date the form for your application to be accepted.

If any section has not been completed the application will be rejected.

Part A section 8: Witness Statement

The Witness Statement only needs to be completed if you have been out of teaching for over 1 year and an employer is not completing Part B.

The signature and details provided must be those of the person who is acting as the witness, the witness must not be a relative of the applicant.

Notes for the Employer

Part B: General:

Section 1 and its certificate must be completed

Section 2 and 3 should only be completed if the member is applying for premature retirement.

Part B: section 1: Employment details

Members' final day of paid employment: It is not the last day the member worked but the last day that the member will be paid up to and end pensionable employment.

Service details: You must supply all outstanding service details, an example line has been provided on the form to give guidance on how the details should be entered. For further information on completing the service details please refer to the Payroll Guide. You can find the Payroll Guide at www.teacherspensions.co.uk/payrollguide.

Certificate

Once all the necessary parts of the application have been completed Part A and Part B of the application form should be returned to Teachers' Pensions together. If any section has not been completed the application will be rejected.

Part B: section 2: Compensation

You should only complete this section when the member is applying for premature retirement.

Question 1 must be completed in all cases.

Question 2,3,4 and 5 need only be completed if you have chosen Teacher's Pensions to administer compensation.

Do you wish Teachers' Pensions to administer the employer's compensation

Tick each box that applies. Be aware if you are completing the form on behalf of a HE institution or an Employer in the Independent sector, then you cannot grant discretionary enhancement.

(continued overleaf)

How to Complete the Application Form *(continued)*

Enter the number of added years of discretionary premature retirement compensation.

If you are not awarding any discretionary compensation then tick 'None'.

If you are awarding discretionary compensation then enter the amount of service awarded in years and days. Be aware if you are completing the form on behalf of a HE institution or an Employer in the independent sector, then you cannot grant discretionary enhancement.

Method of reimbursement of the employers share of the award.

Tick the box that applies. If you choose 'Pay as you go' then the payments must be made for the rest of the members life, you will also agree to pay the charge for the Teachers' Pension Scheme to administer each payment.

Part B: section 3: Certificate

You should only complete this section when the member is applying for premature retirement.

Checklist for the Employer before you return the application to Teachers' Pensions

1. Have you ticked whether you want Teachers' Pensions to administer payment of the compensation and have you indicated how you will reimburse Teachers' Pensions for administering the payment?
2. Have you fully completed the section to certify that the member is leaving due to redundancy or efficiency reasons and is in accordance with premature retirement regulations.
3. Have you provided all outstanding service details?
4. Have you added the full address or address stamp to the certification?

(continued overleaf)

How to Complete the Application Form *(continued)*

Checklist for members before you send in your application

1. Have you checked your application thoroughly to ensure all questions are answered accurately?
2. Where you are choosing to give up part of your annual pension for a lump sum, have you checked the effect this will have on your annual pension?
3. Have you considered all AVC's and non Teachers' Pension Scheme savings as well as all your Teachers' Pensions savings in your assessment for the Lifetime Allowance question 2 (section 5)?
4. Have you signed and dated the application?
5. Where you have been in teaching employment in the past year
 - a. Have you asked your Employer to Complete Part B and return it to Teachers' Pensions?
 - b. Where you have had multiple Employers, have you asked each Employer to complete a Part B?
6. Where you have not been in teaching employment in the past year, has a witness completed the Witness Statement?

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Data Protection Act 1998. 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.**

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