

Cover Additional Service for Family Pensions

Before completing this form please read the accompanying notes

Date of receipt

Part A - To be completed by the applicant in all cases

Section 1 Personal details

1 Teacher's reference number

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2 Surname (one character to each box)

O R E I L L Y

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3 Former Surname (if any)

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4 First Name (s)

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5 Title

Mr Mrs Miss Ms Other

If other, please specify

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6 Date of Birth (e.g. 15/04/75)

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7 National Insurance number

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8 Contact address

Postcode						-					

9 Home telephone number (including STD code)

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10 Mobile telephone number

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11 E-mail address

12 Status

Single Married
 Civil Partner Divorced Nominated Partner

13 Gender of nominee

Male Female

Section 2 Election to cover service

Have you previously made an election to cover service for family benefits?

Yes No

Election to cover service between 1 April 1972 and 5 April 1988 (for widowers and civil partners)

Please indicate the amount of service you wish to cover.

Tick one box only:

a. All service b. Part service

If you have chosen option b, please state the number of whole years you wish to cover.

years

Election to cover service before 1 January 2007 (for nominated partners)

Please indicate the amount of service you wish to cover.

Tick one box only:

a. All service b. Part service

If you have chosen option b, please state the number of whole years you wish to cover.

years

Section 3 Election to cover service bought-in under the added years arrangements prior to 1 June 1988 or transferred-in prior to 6 April 1988 (For widowers and civil partners)

This section may only be completed if you have elected in Section 2 to cover all your service between 1 April 1972 and 5 April 1988. Please tick one box only.

- a. All added years/transferred-in service b. Part added years/transferred-in service

If you have chosen option b, please state the number of whole years you wish to cover.

years

Section 4 Method of Payment

You may choose only **one** method of payment. Please indicate how you wish to cover your service. Tick one box only:

- a. Method A (monthly deduction from salary) at least one year
 b. Method B (single payment)

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

1%	2%	3%	4%	5%	6%	7%	8%	9%
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Declaration - to be completed by all applicants

- + I elect to purchase previous service for family benefits as indicated in Section 2 and 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.

Signed

Date

PART B - To be completed by the employer and returned without delay

1 Establishment number
e.g. 871761000

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Teacher's reference number

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Employment details:

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.

Salary Scale	Full (F) or Part-time (P)	Start Date			End Date			Full-time annual salary rate (including Pensionable Allowance) £	Actual part-time salary paid £	Days excluded	Enter if salary is safe-guarded	Allowances							
		day	month	year	day	month	year					London Additions (i, A, O or F)	Social Priority (1, 2, 3 or 4)	Special classes (7 or 8)	Other allowances £	Supp field	School No or Employment code		

Is the teacher currently in full-time or part-time employment?

Full-time Part-time

Will the salary be subject to a retrospective increase?

Yes No

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.

Signed Name of officer (in CAPITAL letters)

Position Telephone number Extension

Name of contact for admin purposes (in CAPITAL letters) Date

Telephone number (include STD code) Extension

Fax Number

Email address

You should now submit this application to

Teachers' Pensions • Mowden Hall • Darlington • DL3 9EE

Official stamp (LA only). If non-LA establishment, please give address and post code.

Notes for applications to cover additional service for family benefits

Please read these notes before completing the application to
cover additional service for family benefits.

(PLEASE DETACH AND RETAIN)

Qualifying for Family Benefit

Widows / Children

All pensionable service under the TPS from 1 April 1972 counts for widow's and children's pensions.

Widowers / Children / Civil Partners of male and female teachers

All pensionable service under the TPS from 6 April 1988, together with any service purchased under the past added years' arrangements after 31 May 1988, counts for widower's, civil partner's and children's pensions.

Nominated Partners

All pensionable service under the TPS from 1 January 2007 counts for nominated partner's pensions

Pensions

Short term

If you die in service or within a year of leaving due to ill health but have not received ill-health benefits under the TPS, a short-term pension will be paid for three months at the rate of your final salary. There is also an equivalent short-term pension payable for one or more eligible children, paid concurrently.

A short-term pension is not payable if you die out of service.

If you die after retirement, a short-term pension is only payable if a long-term pension(s) is due to be paid. It would be payable for three months at the rate of your final pension. There is also an equivalent short-term pension payable for one or more eligible children, paid concurrently.

If there is no spouse, civil partner or registered 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

A pension will be paid if you have at least two 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. It will be one half of your pension if all your service counts for family benefit or a smaller proportion if you have not covered all your service. A pension is payable for life if the member 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 are under 23 and receiving full-time continuing education or training lasting at least 2 years without a break of more than 1 academic year, or
- + children who are incapacitated when you die.

Half of the spouse's, civil partner's or nominated partner's pension is payable for one child; two or more children receive the same rate as the spouse, civil partner or dependants pension. A higher rate of child's pension is paid if there is no pension payable to an adult.

Index linking of family pensions

To help maintain their original purchasing power, family pensions are increased annually in line with the rise in the cost of living.

Increasing the value of family pensions

The rate of pension depends on the amount of qualifying service. If you wish to provide for an increased pension, you will need to purchase all or part of your earlier service. You may only make an election within:

- + six months of returning to pensionable employment if you have not been employed for any continuous period of six months from 26 June 1973 (for widow's), 1 October 1988 (for widower's) or from 21 December 2005 (for civil partner's);
- + six months of your marriage or civil registration;
- + six months of returning to pensionable employment if you married or registered a civil partnership while not employed;
- + in the case of a nomination of a partner, within six months of the date of nominating your partner.

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.

Conditions of payment

You may elect to increase the contribution rate within the applicable limits at any time. You will not be able to reduce the contribution rate.

Breaks in service or employment in part-time pensionable employment will automatically extend the period. If you are in part-time employment and making a new election, the percentage rate contributions will be calculated as the full time equivalent of your salary.

The additional contributions will continue to be payable until all the service has been paid for, irrespective of any change in your circumstances.

If at the time of retirement the payment period has not been completed, then the outstanding contributions will automatically be deducted from the lump sum.

Income tax relief on payments

Additional contributions to cover previous service for family benefits will attract tax relief in the same way

as normal pension contributions.

Acceptance of an election

On receipt of a valid election, the payment period will be determined based on the contribution rate chosen by you for the amount of service specified. If you decide to pay by instalments, your employer will be notified of the contribution rate, the amount of service covered and the period of payment.

You should check that the correct deductions are made from your salary each month to avoid an overpayment or the need for payment of arrears. Any apparent errors should be queried with your employer immediately.

If you require any further information, please contact Teachers' Pensions via the TP website, www.teacherspensions.co.uk, or on 0845 6066166; minicom: 0845 6099899. Please quote your teacher's reference or National Insurance number.

Data Protection Act 1998

The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme for the purpose of administering and operating the scheme and paying benefits under it. This may include passing details to third parties that are involved in the administration and operation of the scheme. The Department may also use your data for administrative purposes in line with its data protection notification. In order to fulfil its duty to protect public funds, the Department for Education may use information it holds to prevent and detect fraud. The Department may also share such information, for the same purpose, with other organisations that handle public funds.

If there is any difference between the legislation governing this scheme and the information in these notes, the legislation will apply.