



**18 Name of UK bank or building society**

**19 Branch sorting code**

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**20 Your bank account number**

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**21 Building society roll number**

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**22 Name of account holder**

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**23 If your bank is outside the UK, please provide details**

**IBAN/ Bank and account codes**


**BIC/ Swift code**


**Full postal address of overseas bank**


**Section 3 About the solicitors**

**Are solicitors dealing with the estate, or acting on your behalf?**

Yes  If yes, complete this section then proceed to section 4. No  If No, proceed to section 4.

**Address**

Postcode											

**Telephone number**

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**Are the solicitors applying for Grant of Probate?**

Yes  No

**Would you like Teachers' Pensions to deal with the solicitors?**

Yes  No

**Would you like Teachers' Pensions to pay the death grant direct to the solicitors?**

Yes  No

**Was the deceased receiving any other pension from TP?**

Yes  No

If yes, please tick the relevant box:

Member pension

Dependant pension

Credit member pension

**Section 4 Certificates—only original documents will be accepted.**

**Tick boxes to indicate documents enclosed**

Death Certificate  Marriage Certificate

Children's birth certificates  Adoption Certificate

Grant of Probate  Certificate of continuing education

Decree absolute  Dissolution certificate

Civil registration certificate  Certified Power of Attorney or Court of Protection order

Proof of financial independency

**Section 5 Declaration - To be signed by the beneficiary**

**Declaration**

- + I apply for death benefits under the Teachers' Pensions Regulations.
- + I have read and understand the enclosed literature.
- + The information I have given on this form is true to the best of my knowledge and belief.
- + In signing this form I agree that any overpayment of pension made to the deceased member can be recovered out of any pension due.
- + I understand that if the death grant is paid more than 2 years after the date Teachers' Pensions first became aware of the death, the lump sum will be subject to tax.

Signed

Date





# Certificate of Continuing Education

(to be completed by the parent or guardian of the student before forwarding to the relevant establishment to complete the declaration overleaf)

Name of deceased teacher..... Teacher's ref number.....

Name of student.....

Course..... Start date..... End date.....

Course..... Start date..... End date.....

Course..... Start date..... End date.....

a. The current education will last for approximately..... years and... .. months; or

b. Is expected to terminate on..... (date)

**(Please note either section a. or b. above should be completed in all cases, whichever is applicable)**

Name and address of school or current education establishment.....

.....

Any breaks in education should be details below and should also include details of any earnings received:-

Start date of break in education..... End date.....

Reason..... Earnings received £.....

Start date of break in education..... End date.....

Reason..... Earnings received £.....

Signature of parent or guardian..... Date.....

## Declaration

This must be signed by a responsible officer of the school or education establishment.

I confirm that .....is still continuing or in full time education and is under age 23.

Signed

Date

Position

Telephone Number

Email address

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

Please return to  
**Teachers' Pensions • P.O Box 158 • Darlington • DL3 9WD**

## Certificate of Full-Time Training

(to be completed by the employer)

Name of deceased teacher..... Teacher's ref number.....

**I certify that** ..... **(name of employee)**  
is undergoing full-time training for the period :

From..... To.....

Rate of pay: £..... a week / month / year (please delete as appropriate)

**Particulars of any return of premium paid for such training included in the above:**

Signed

Date

Position

Telephone Number

Email address

Official stamp

# Notes for Death Benefits

P.O. Box 158  
Darlington DL3 9EE

Please read these notes before completing the Death Benefit application.

**(PLEASE DETACH AND RETAIN)**

This form should be completed by the person to whom the death grant or residue is to be paid. If solicitors are dealing with the estate or acting on your behalf they may complete the form on your behalf but you will be required to sign it. You should ensure that your solicitors details are included on the form.

A death grant is payable to the person nominated to receive it by the member. If there is no nominee, it will be paid to the member's spouse, civil partner, nominated partner or, if there is no such person, it will be paid to the member's personal representative on production of Letters of Administration and if the amount payable exceeds £5,000, TP will require a Grant of Probate.

**Until all relevant information and documentation is received TP cannot process your claim.** The following **original** documents (where applicable) should be forwarded together with the application form:

- + **Death certificate** - required in all cases. If this is a foreign certificate and the cause of death is not stated, TP will require written evidence from either the coroner or a medical practitioner stating the cause;
- + **Marriage certificate** – where deceased member was married when they died;
- + **Civil Partnership registration certificate** - where deceased member had a registered civil partnership when they died;
- + **Decree absolute** - where deceased member was divorced when they died;
- + **Dissolution certificate**– where deceased member's civil partnership had been dissolved when they died;
- + **Proof of financial interdependency** – where the deceased had a nominated partner; examples of proof of financial interdependency are joint bank accounts, utility bill or a joint mortgage;
- + **Child(ren)'s birth certificates**– where deceased member had any eligible children;
- + **Adoption certificate**- where eligible children were adopted;
- + **Certificate of continuing education**– where eligible children are over 17 years old, under 23 and are in continuous full time education or training;
- + **Grant of Probate/Letters of Administration** - where deceased member died before receiving retirement benefits and was unmarried or not registered as a civil partner and the estate is over £5,000;
- + **Power of Attorney (certified)** - where the person signing is not legally entitled to receive family benefits and is signing on behalf of the spouse or civil partner.

If the deceased was in teaching employment at the date of death or if the deceased left teaching in the last two years TP will need to contact the employer to obtain service and salary details up to the date of death. If the deceased was in receipt of any compensation from their employer in respect of premature retirement, please notify that employer in order that they can cease their payments and avoid an overpayment occurring.

The death grant will be paid directly into the bank or building society account entered on the form.

**PART B – To be completed when the deceased TPS member has a spouse, civil partner, nominated partner, nominated dependent relative and/or eligible children.**  
**Do not complete this section if the deceased was receiving a pension as a beneficiary or as a result of a pension sharing on divorce or annulment order.**

An adult beneficiary's pension will cease upon their death.

The dependency of nominated partners and nominated dependent relatives will be re-assessed before a pension is paid.

A pension is payable in the event of a member's death, provided the member was married or in a civil partnership and has sufficient family benefits service to qualify.

A potential spouse's or civil partner's pension is 1/160<sup>th</sup> of the member's average salary for each year of family benefits service. The basis of the calculation is as follows:

Service counting for family benefits x Average Salary  
160

Pensions increase is applied at the same rate as the member's pension.

An amount equal to one half of the adult's pension is payable for one child. Two or more children will receive an amount equal to the adult's pension which will be divided equally among them.

Children include:

- + those born during the member's lifetime or within 12 months of the date of death. you must include any children born to a previous partner;
- + adopted children; and
- + unadopted children who lived as part of the member's family at the date of death and were financially dependant on the deceased member.

An eligible child must be:

- + Unmarried or not registered as a civil partner; and
- + Under age 17; or
- + Under age 23 and since attaining age 17 in continuous full time education or training lasting at least 2 years for a trade or profession without a break of more than one academic year; or
- + Incapacitated when the member died and unable to earn a living due to ill health (Please provide a letter from a doctor to confirm and details of any benefits received from the state).

There are circumstances when a child's pension may exceptionally be paid after age 23. Please contact TP for further information.

A child is to be treated as not attending a course of training when receiving disqualifying remuneration.

If a child is over age 17, under 23 and in full-time education without a break of more than one academic year or is undergoing full-time training please also complete the certificate of continuing education, enclosed in the pack. Photocopied forms are acceptable.

If a child is under age 18 the long term pension will be paid to their surviving parent or legal guardian. If a child is age 18 or over the long term pension will be paid directly to them.

If a child is age 18 or over their short-term pension will be paid directly to them.

Please give details of the guardian(s) of the child(ren) and provide proof of guardianship, e.g. Court of Protection Order.

Where a member dies after payment of retirement benefits a supplementary death grant (SDG) may be payable. An SDG will be paid if the amount of pension already paid to the member is less than five times the annual rate of pension in payment at the time of the member's death. In such a case an SDG would be paid to make up the difference

**Overpayment of member's pension** - A member's pension is paid up to and including the date of death. Any pension paid after this date will result in an overpayment. This amount is recoverable and any arrears of the family pension can be used to reduce or clear the overpayment.

### **Lifetime Allowance (LTA)**

All death grants and supplementary death grants are subject to checks on the deceased member's LTA to ensure that the amount payable is within the limits set by Her Majesty's Revenue and Customs (HMRC).

The executor of the estate needs to check whether the total benefits payable are within the LTA. If the LTA is exceeded, a LTA charge will become payable. It is the executor's responsibility to inform HMRC where the total benefits exceed the LTA and to pay any tax due. Any enquiries you have regarding this should be directed to HMRC.

At the time the death grant is calculated we will provide the percentage of the LTA this payment represents.

### **Unauthorised Payments**

Payment of the death lump sum must be made within 2 years of the date of death. It is, therefore, important that TP are provided with all the information required as soon as possible after the death.

### **Grant of Probate and/or Letters of Administration**

It is necessary for Teachers' Pensions to inspect a sealed copy of Probate of Will or Letters of Administration (i.e. a copy bearing the impressed seal of the court) where the benefits payable exceed £5,000 and there is no surviving spouse or civil partner. Where it is intended to apply for Grant of Probate or Letters of Administra-

tion, payment will be made to the executor or administrator named in the Grant.

Grant of Probate or Letters of Administration can be obtained in the following ways:

- + **In England and Wales**, you can apply personally or through a solicitor. Personal applicants may obtain the necessary forms by telephoning the Probate Office on 0845 3020900. You may also obtain these forms from your nearest District Probate office;
- + **In Scotland**, confirmation of Executor or Grant of Probate can be obtained from the Sheriff Court of the County in which deceased lived up to the date of death;
- + **In Northern Ireland**, you can apply personally or through a solicitor to obtain a Northern Ireland Grant of Probate. Personal applicants may apply to : The Master, Probate Office, High Court of Northern Ireland, Chichester Street, Belfast BT1 3JN;
- + **In Eire**, payment will be made on a local grant where there are no assets which make it necessary to obtain an English Grant;
- + **Overseas**, a non UK grant or a completed overseas declaration witnessed by any person competent to administer oaths under the law of the relevant country will be sufficient.

### **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 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 funds, the DfE may use information it holds to prevent and detect fraud. The DfE may also share such information, for the same purpose, with other organisations that handle public funds.

**Where there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this leaflet, the legislation will apply.**