

# Nomination of Partner

Date of receipt

NOT TO BE COMPLETED IF YOU ARE MARRIED OR IN A CIVIL PARTNERSHIP

Before completing this form please read the accompanying notes

PLEASE COMPLETE THE FORM IN BLOCK CAPITALS USING BLACK INK

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

### 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


I nominate my partner named below to receive an adult dependant's pension from the TPS in the event of my death.

12 Surname (one character to each box)

O R E I L L Y

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13 First Name(s)

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14 Title

Mr  Mrs  Miss  Ms  Other

If other, please specify

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

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16 National Insurance number

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17 Contact address

Postcode						—				

## Part B - Declaration by Scheme member

### Declaration

I confirm the following:

- + We have lived together for  years, during which time our financial affairs have been interdependent (or the partner has been financially dependent on the Scheme member);
- + 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;
- + Neither of us is currently nominated as the partner of anyone else;
- + 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.

#### Member's signature

Signed

Date

#### Partner's signature

Signed

Date

# Notes for nomination of partner

Mowden Hall  
Darlington DL3 9EE

Please read these notes before completing form  
'Nomination of Partner'.  
**(PLEASE DETACH AND RETAIN)**

You may nominate your partner to receive a pension from the Teachers' Pension Scheme (TPS) after your death provided certain conditions are met. To nominate your partner you can complete the attached form and send it to Teachers' Pensions (TP). Alternatively the application can be submitted online on the TP website:  
[www.teacherspensions.co.uk](http://www.teacherspensions.co.uk).

If your relationship comes to an end, it is important that you tell TP as soon as possible so that they can cancel your nomination. If you enter into a new permanent relationship, you may want to make a new nomination at some time in the future.

You should be aware that after your death, your partner will need to provide information to TP to support his or her claim to a partner's pension.

For a nomination to be accepted the conditions to be met are:

- + you must have pensionable teacher service after 31 December 2006;
- + you and your partner have been living together in an exclusive committed long-term relationship for 2 years;
- + you and your partner are free to marry or to enter a civil partnership; and,
- + either your partner is financially dependent on you or the two of you are financially interdependent.

Neither you nor your partner can be married to, or in a civil partnership with, anyone else. Overleaf is a list of relationships which do not permit a marriage or civil partnership.

Financial interdependency means that you rely on your joint finances to support your standard of living. It does not mean that you need to be contributing equally. Evidence of financial interdependency might include:

- + confirmation that you live in a shared household;
- + share household spending;
- + share bank accounts or investments;
- + having a loan or mortgage in joint names;
- + having wills naming each other as the main beneficiary;
- + holding a mutual power of attorney; and
- + your partner being nominated as the main beneficiary of life assurance.

TP will pay a pension to a surviving partner provided that you have two years in the scheme from 1 January 2007. You can cover previous teaching service for family benefits by paying extra contributions. Further information is available on the TP website.

Your 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.

TPS will also pay a lump sum death grant if you die before you retire. You can nominate whoever you like to receive the death grant, further information is available on the TP website.

If you die while you are still contributing to the scheme, TP will usually add on some extra years of service (we call this a 'service enhancement') when calculating your partner's pension. If you die after retirement or after leaving the scheme, your 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 TP. Your partner will have to complete a claim form and provide information to support his or her claim to a partner's pension. Your partner will be asked to supply information that is appropriate at the time of your death rather than at the date of your declaration. TP need to be satisfied that you continued to meet the conditions for nominated partners. If your circumstances force you to spend your final years away from home, for example, in residential nursing care, the scheme administrators will take account of your situation when you were living at home as well as at the time of your death.

### **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. 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.

### **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.

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