

TRANSFER IN

Please read the accompanying notes before completing this form. You must ensure that each section is fully completed by the appropriate party and only then should you submit the full set to Teachers' Pensions

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

Section 1 Personal details

1 Teacher's reference number

RP			/						
----	--	--	---	--	--	--	--	--	--

2 Surname (one character to each box)

O R E I L L Y

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

3 Former Surname (if any)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

4 First Name(s)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

5 Title

Mr Mrs Miss Ms Other

If other, please specify

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

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

--	--	--	--	--	--	--	--

7 National Insurance number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

8 Contact address

Postcode						-				

9 Home telephone number (including STD code)

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

10 Mobile telephone number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

11 E-mail address

12 What is your marital status?

Married Civil Partnership Unmarried

If you are married or in a civil partnership, please enter date of registration.

--	--	--	--	--	--

Declaration

- + I confirm that I have joined the Teachers' Pension Scheme (TPS).
- + I wish to apply to transfer accrued credit in a former scheme in to the TPS.
- + All the information I have given on this form is true to the best of my knowledge and belief.

Signed

--

Date

--

PART C - To be completed by previous pension provider regarding a potential transfer of benefits into the Teachers' Pensions Scheme (TPS). This form must be returned to the applicant.

The TPS is a registered pension scheme and the HMRC reference number is 00328821RM. The TPS will accept liability for any Equivalent Pension Benefits (EPB). The TPS is contracted out of the state scheme and will accept GMP liability, which will be revalued in line with the full Section 148 Orders. The TPS SCON number is S2730011H and the ECON number is E3900002R. **Do not include any payment at this stage.**

Forename of applicant

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Surname of applicant

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

National Insurance number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Full name and address of pension scheme

Postcode																			

Please complete the relevant section below and provide all the information as listed. If providing the information as part of your own standard pro-forma reply, please ensure that all of the details listed are present.

Club Scheme (Please Tick)

Please provide a full transfer statement in the standard 'Club' format

Non-club occupational scheme (Please Tick)

Please complete the details below **and also the statement overleaf**

Is the Scheme HMRC Registered?

Yes No

If Yes, please enter PSTR Reference Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Contracted in status

Contracted In Contracted Out

Scheme Type

Money Purchase Salary Related

Dates of Scheme Membership

Start Date End Date

Dates of Contracted out Membership*

Start Date

Transfer Value Statement

Total Transfer Value £

Post 5 April 1997 Transfer Value (Protected rights) £

Weekly GMP Amount Pre 6 April 1988 * £

Weekly GMP Amount Post 6 April 1988* £

Date Last Revalued

Rate of GMP Revaluation* Fixed Full Limited

ECON number

SCON number

Personal Pension/ Stakeholder/ Section 32 Buy Out **Section 620 Retirement Annuity Policy**

Please complete the details below. **You do not need to complete the statement overleaf but please enter your details overleaf.**

Is the Scheme HMRC Registered?

Yes No

If Yes, please enter PSTR Reference Number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Policy Start / End Date

Start Date End Date

Dates of Contracted out Membership*

Start Date End Date

Transfer Value Statement

Total Transfer Value £

Post 5 April 1997 Transfer Value (Protected rights) £

Contracted Out Deduction Amount ** £

Date Last Revalued

ASCON Number

* Please leave blank if not appropriate

** To be obtained by you from HMRC, prior to returning the form to the member, only where the member has contracted out membership prior to 06/04/1997

European Court of Justice Rulings about equalisation of benefits and transfer values - To be completed by Non Club Occupational Pension Schemes following a request to transfer pension benefits to the Teachers' Pension Scheme (TPS)

1 Name of applicant

National Insurance number

--	--	--	--	--	--	--	--	--	--

Does not have benefits accrued on or after 17 May 1990 either in our scheme or which were transferred into our scheme from another pension scheme or arrangement - **please sign, date and return this form to the applicant.**

Has benefits accrued on or after 17 May 1990 either in our scheme or which were transferred into our scheme from another pension scheme or arrangement - **please proceed to 2**

2 The benefits in excess of GMP which accrued in our scheme on or after 17 May 1990:

Have been equalised between male and female members of the scheme of otherwise like circumstances - **please proceed to 3**

Have **not** been equalized between male and female members of the scheme of otherwise like circumstances - **please proceed to 3**

3 For the purposes of assessing the transfer value, the above named member's benefits in excess of GMP which accrued on or after 17 May 1990:

Have been calculated as the better of those available to male or female members of the scheme of otherwise like circumstances - **please proceed to 4**

Have **not** been calculated as the better of those available to male or female members of the scheme of otherwise like circumstances - **please proceed to 4**

4 Should it be found that there has been inadequate equalisation to the benefits which accrued in our scheme on or after 17 May 1990:

We will make good any deficiency in our transfer value representing the member's benefits - **please proceed to 5**

We will **not** make good any deficiency in our transfer value representing the member's benefits - **please sign, date and return this form to the applicant.**

5 If the transfer includes a value previously transferred in and it is found that there has been inadequate equalisation to the benefits which accrued on or after 17 May 1990:

We will make good any deficiency in our transfer value representing the member's benefits whether or not the scheme or arrangement which paid the transfer value to our scheme makes good the deficiency in its transfer value - **please sign, date and return this form to the applicant.**

We will not make good any deficiency in our transfer value representing the member's benefits whether or not the scheme or arrangement which paid the transfer value to our scheme makes good the deficiency in its transfer value - **please sign, date and return this form to the applicant.**

No previous Transfer In - **please sign, date and return this form to the applicant.**

Scheme Name: Signed: Name:

Position: Contact Details: Date:

For and on behalf of the Trustees or Administrators of the Pension Scheme named above

Notes for Transfer In applications

Mowden Hall
Darlington DL3 9EE

Please read these notes before completing the Transfer In application.

(PLEASE DETACH AND RETAIN)

Eligibility

An application to transfer pension benefits from a previous pension scheme must be submitted to Teachers' Pensions (TP) within 12 months of you entering pensionable teaching service.

If your previous pension provider was the Teachers' Pension Scheme in Scotland or Northern Ireland, the transfer can take place at any time.

The Transfer Process

There are three types of scheme categories: club (broadly public sector), and Non Club Other Occupational Schemes and individual policies.

Submitting a fully completed application form is the beginning of the process; this does not commit you to transferring your previous pension credit into the Teachers' Pension Scheme (TPS). TP will use the information supplied by your employer and previous pension scheme to produce a quotation that will be sent to you for consideration. The quotation will be an offer of service (expressed in years and days) that the transfer value specified by your previous scheme will purchase in the TPS. It will be up to you to decide whether to accept the service offered. If you decide to go ahead, the transferred-in service will be added to the pensionable service you accrue in the TPS, and the aggregated total will be used in the calculation of your pension benefits.

If a non-club transfer is received after 12 months of joining the TPS, the service will be calculated using your salary and age at the date the transfer value is received.

Please note that any Additional Voluntary Contributions (AVCs), or Free Standing AVCs associated with your previous scheme, cannot be transferred into the TPS. However, it may be possible for these to be transferred to Prudential, the appointed provider of this facility for the TPS.

How to Apply

The Transfer In application form must be completed in all cases. The form is designed to collect information from you, your employer and your previous scheme. It is your responsibility to organise the collection of all of the information required. We ask that once you have completed Part A, which is information about yourself, you then request the information that is required from them. We advise you to send a copy of these notes to each party when you ask them to complete the relevant part of the form.

You should ensure that all parts of the form are returned to you and are complete before sending them to TP for processing. Once it is received by TP, you can monitor its progress by accessing 'Track My Case' in the secure area of the TP website.

Part A - Information About You

The details required here are self explanatory.

For transfers from Scottish Teachers' Scheme you will also need to complete a separate form (TV OUT APPL) which you can obtain from the Scottish Public Pensions Agency. This form should be returned with your application.

Part B - Information From Your Employer

This application form may be the first information TP has received about your employment and membership of the TPS. Therefore we ask employers to provide the full set of data that TP requires upon the appointment of a new teacher. The salary will be used in the calculation to determine the service that will be offered to you.

Part C - Information From Your Previous Pension Provider

You need to forward Part C to the administrators of your previous pension scheme for them to complete. You are advised to enter your name and NI number prior to sending the form to them. If your former scheme was a non-club occupational scheme, for the transfer to be accepted by the TPS, they must complete sections 4 and 5 confirming that they will make good any deficiency. Please note. Any other response will lead to the application being rejected.

Returning the Form

Once all the sections of the form have been fully completed you should send it to:-

Teachers' Pensions
PO Box 158,
Darlington,
DL3 9DW.

Data Protection ACT 1998

The Department for Education (DfE) will use any information you provide in connection with the TPS 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 administering 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, 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 these notes, the legislation will apply.