

PART B - To be completed by the current employer. Please provide full information from the member's first date of employment onwards.

Once completed return this form direct to the member.

Name of Member.....

Date of Birth Verified? Yes No

Teacher's reference number /

Establishment number /

Employment details

Salary Code	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 S if salary is safe-guarded	Allowances						
		day	month	year	day	month	year					London Additions (1, A, O or F)	Social Priority (1, 2, 3 or 4)	Special classes (7 or 8)	Other allowances £	Supp field		

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 (include STD code)

Extension

Name of contact for admin purposes (in CAPITAL letters)

Email address

Telephone number

Extension

Fax Number

Date

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

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

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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 credit 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.

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

The Transfer Process

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 credit (expressed in years and days) that the transfer value specified by your previous scheme will purchase in the Teachers' Pension Scheme. It will be up to you to decide whether to accept the service period offered. If you decide to go ahead the transferred-in period will be added to the periods of 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 credit 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 TPS. However, it may be possible for these to be transferred to Prudential, the appointed provider of this facility for the TPS.

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.

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

Part A - Information About You

The details required here are self explanatory. If you are able to provide your mobile telephone number and/or your email address we will use these to provide you with progress updates.

For transfers from Scottish Teachers' Scheme you will also need to complete a separate form (SSTS1) 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 credit 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 they must complete sections 4 and 5 affirmatively on the reverse of the form for the transfer to be accepted by the TPS.

Data Protection ACT 1998

The Department for Education 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 administering 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, 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.