

Application for Early Retirement (Actuarially Adjusted Benefits)

This form should be used to claim your pension before your Normal Pension Age if you are applying for actuarially adjusted benefits. You should not use this form if you are applying for Phased, Premature, Ill-health retirement or Additional Service after Retirement.

For more information on your Normal Pension Age please refer to www.teacherspensions.co.uk/npa.

Please complete this form using black ink and in BLOCK CAPITALS.

Part A: To be completed by the applicant in all cases. Please refer to 'How to complete the Application Form' for help completing Part A.

Notes:

- You should read the section 'How to Complete the Application Form' before completing this form.
- You should ensure that you complete ALL sections and questions in the form (unless otherwise stated). If you do not supply the required information this may result in delays processing your application, and to the subsequent payment of retirement benefits, whilst we obtain the relevant information.
- Once you have completed the form you may find it helpful to refer to the Checklist for Members before you send in your application.
- You may find it useful to visit our retirement centre at www.teacherspensions.co.uk/members/planning-retirement for more information about your benefits and how to apply for them.

Section 1: Personal details

1. Teacher's Pensions reference number (example 99/99999)

/

8. Contact address

2. Surname (one character per box)

3. Former surname (if any)

Postcode

9. Home telephone number (inc. STD code)

4. First name

10. Mobile telephone number

5. Title (please cross 'X', or state if other)

Mr Mrs Miss Ms Other

11. Personal email address

(Must match the one linked to your MPO account. If not, this will cause issues when next logging into your MPO account.)

6. Date of birth (DD/MM/YYYY)

12. Last date of teaching employment (DD/MM/YYYY)

(Your final day of paid employment)

7. National Insurance number

(Continued overleaf)

Part A: To be completed by the applicant in all cases (continued).

Section 2: Payment details

Your benefits will be paid into the account you nominate below. Please note that we will only be able to make payments to an account or joint account that is in your name.

Do you want your benefits to be paid into a UK bank account? Please cross 'X' in the relevant box.

(Please note that payments made to overseas bank accounts will only be paid in the bank's local currency.)

Yes Then complete questions 1 to 5 in this section.

No Then complete question 4 and 6 to 8 in this section.

1. Branch sort code

- -

6. IBAN/Bank and account codes

2. Your bank/building society account number

7. BIC/Swift code

3. Building society reference number (if applicable)

4. Name of account holder

(Please enter the name as it appears on your card)

8. Full name and address of overseas bank

Postcode

5. Full name and address of UK bank

If you choose to have your pension paid into an overseas bank account, a monthly administration fee of £1 will be applied.

Postcode

Section 3: Survivor details

These details may be used if we receive an application for survivor benefits after your death.

1. What is your current relationship status? Please cross 'X' one.

Single/Widow/Widower

Opposite sex marriage

Divorced

Same sex civil partner

Partnership dissolved/Revoked

Have a nominated partner

Same sex marriage

Opposite sex civil partner

2. Enter date of marriage / civil partnership (DD/MM/YYYY)

3. Name of survivor

4. Enter date of birth of spouse / partner (DD/MM/YYYY)

5. If divorced, enter the date of the Decree Absolute / Partnership Dissolved (DD/MM/YYYY)

(Continued overleaf)

Part A: To be completed by the applicant in all cases (continued).

Section 4: Lump sum choices

Notes: You should read the 'How to Complete the Application Form' notes for Part A Section 4 before completing the questions below.
Once your application is received by us and processed, your decisions cannot be changed.

If you're in the NPA 60 section and do not have any pensionable service on or after 1 January 2007, you will receive a lump sum of 3 times your pension but you do not have the option to give up part of your pension to increase your lump sum.

You should answer all 4 questions in this section. If any question does not apply to you, please cross 'X' 'not applicable'.

1. Benefits if you have a normal pension age of 60 (NPA60)

If you joined the Scheme prior to 1 January 2007, you have NPA 60 service. You will automatically receive a lump sum in respect of your pensionable service as an NPA 60 member of 3 times your pension. If you have any pensionable service on or after 1 January 2007 you have the option to take an additional lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**. You can specify the amount per year that you wish to give up **or** you can indicate that you wish to give up the maximum that is allowed.

Amount per year
or
Maximum allowed

No, I do not wish to convert pension for an additional lump sum payment/ I am not eligible (all service before 1 January 2007)

Not applicable - If you do not have NPA 60 service, cross 'X' here

2. Benefits if you have a normal pension age of 65 (NPA65) in the Final Salary arrangement

If you joined the Scheme on or after 1 January 2007, you will have NPA 65 service. If you joined prior to 1 January 2007 but had a 'disqualifying break' of more than 5 years, you will have NPA 60 and NPA 65 service. The exception to this is if you returned to the Teachers' Pension Scheme on or before the 31/12/2007 and did not have a subsequent disqualifying break. You **will not** automatically receive a lump sum in respect of your pensionable service as a NPA 65 member but have the option to take a lump sum. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**. You can specify the amount per year that you wish to give up **or** you can indicate that you wish to give up the maximum that is allowed.

Amount per year
or
Maximum allowed

No, I do not wish to convert pension for an additional lump sum payment.

Not applicable - If you do not have NPA 65 service, cross 'X' here

3. If you are a member of the Career Average arrangement on or after 1 April 2015, you **will not** automatically receive a lump sum but have the option to take a lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**. You can specify the amount per year that you wish to give up **or** you can indicate that you wish to give up the maximum that is allowed.

Amount per year
or
Maximum allowed

No, I do not wish to convert pension for an additional lump sum payment.

Not applicable - If you do not have Career Average service, cross 'X' here

(Continued overleaf)

Part A: To be completed by the applicant in all cases (continued).

- 4. Additional Pension Elections.** If you have bought or are buying Additional Pension you have the option to give up part of your Additional Pension to increase your lump sum. **Do you wish to do this?**

Yes If yes, please indicate how much of your annual pension **you want to give up**. You can specify the amount per year that you wish to give up **or** you can indicate that you wish to give up the maximum that is allowed.

Amount per year
or
Maximum allowed

No. I do not wish to convert pension for an additional retirement lump sum

Not applicable - I do not have Additional Pension and therefore, not applicable

Section 5: Other Details

- 1. Have you been employed by more than one Employer relevant to The Teachers' Pension Scheme in the past 12 months? Please cross 'X' the relevant box.**

Yes No

If yes, please ensure that you complete an application form for each Employer so that each Employer completes a Part B of the form. It is acceptable to photocopy the completed Part A for the additional forms.

Please provide names and addresses of each Employer in the box below (continue on a separate sheet if necessary).

If you've previously crystallised benefits, hold a valid LTA or TTFAC certificate, or have an enhancement factor you will need to complete the Lump Sum Allowance assessment form. Failure to do so may result in a delay to the processing of your retirement award.

Have you previously transferred to an overseas scheme, claimed a pension or lump sums, or intend to claim a pension or lump sums at or around the same time as your teacher's pension, from any other scheme?

Yes No

- 3. Annual Allowance**

If you believe that you may have incurred an Annual Allowance tax charge in excess of £2,000 in the current Pension Input Period (PIP), then any Scheme Pays election you may wish to make must be received and paid by TP before your pension can be put in to payment.

- 2. Lump Sum Allowance - For more information regarding Lump Sum Allowances please refer to www.hmrc.gov.uk.**

On 6 April 2024 three new allowances replaced the previous Lifetime Allowance (LTA) regime. These new allowances restrict the total tax-free lump sum payable across all registered pension schemes. The allowances take account of lump sums already taken (even those prior to 6 April 2024). Where a Transitional Tax-Free Amount Certificate (TTFAC) has not been issued, a lump sum of 25% of the total crystallised value is presumed to have been taken. The allowances may be increased when supported by a valid Lifetime Allowance Protection Certificate, or an enhancement factor.

- 4. Please only complete if you're currently purchasing Past Added Years (PAY):**

Accept the PAY service paid for up to date of retirement?
OR

Pay the outstanding contributions by means of a cheque payment prior to receiving payment of your benefits from the Teachers' Pension Scheme? Please see the section on "recycling" in the accompanying notes.

If you choose to pay the outstanding contributions we will contact you to confirm the cost.

If you are currently not in teaching employment please ensure that you complete section six on the following page.

Section 6: Payable date

If you have completed this form while still in teaching employment, your benefits (including any lump sum) will be paid from the first day after leaving that employment, provided you have reached the age of 55. If you have completed this form having already left teaching employment, please indicate, below, the payable date from which you would like your benefits to be paid. This cannot be earlier than 6 weeks after the date you sign the form. If there is no date selected, or the date selected is less than 6 weeks after the date you sign the form, then Teachers' Pensions will pay your benefits from 6 weeks after the date you sign the form. Any return to teaching in the six week period prior to the payable date will invalidate your application

1. Payable date (DD/MM/YYYY)

Section 7: Declaration

Please ensure you read all of the declaration statements below before you date and sign this section.

- I apply for payment of Early Retirement (Actuarially Adjusted Benefits) under the Teachers' Pensions Regulations and understand that an adjusted pension is paid for life.
- I will have ceased all pensionable teaching employment or excluded employment in England and Wales with effect from the date shown in Section 1 item 12, and I will have a contractual break in teaching employment otherwise this application is invalid.
- I agree to inform Teachers' Pensions of any change to my retirement date or to any other details I've provided on this form.
- I confirm that I have ceased all eligible employment and that any further employment will be subject to a new contract and there will be at least a one-day break between contracts.
- I understand that if I have previously transferred to an overseas scheme, claimed or intend to claim pension or lump sum from any other scheme I MUST inform Teachers' Pensions of the value of those benefits.
- I confirm that I am not in breach of His Majesty's Revenue & Customs (HMRC) recycling rules. For further information please refer to www.hmrc.gov.uk.
- I understand that the lump sum choices I have made are irrevocable and cannot be changed.
- All the information I have given on this form is true to the best of my knowledge and belief.
- I acknowledge that, if I have any benefits in the Career Average arrangement that are taken before normal pension age, these benefits will have a different actuarial reduction depending on whether I am deemed to be 'active' or 'deferred' immediately before my entitlement day.
- I'm aware that whatever my circumstances, it's always best to discuss my plans with my employer. (Don't forget, you'll need the agreement of your employer if you're planning to take Early Retirement payable immediately after your last day of pensionable employment).

Date (DD/MM/YYYY)

Signature

Now ask your Employer to complete Part B before returning the completed form to Teachers' Pensions.

- Exception: If you left teaching employment more than 1 year ago, please ensure that Part A, section 7 is appropriately witnessed and return to Teachers' Pensions, 11b Lingfield Point, Darlington, DL1 1AX.

Section 7: Witness Statement.

This section should only be completed when the applicant has been out of teaching for more than 1 year.

This section must be completed by a witness, the witness must not be a relative or a nominated partner.

Please note the application must be signed and witnessed on the same date, otherwise the application will be rejected.

- I certify that this declaration was signed on this day, in my presence, by the person who I believe to be the applicant.

1. Name

3. Contact address

2. Home telephone number (inc. STD code)

Postcode

Date (DD/MM/YYYY)

Signature

Now ask your Employer to complete Part B before returning the completed form to Teachers' Pensions.

- Exception: If you left teaching employment more than 1 year ago, please ensure that Part A, section 7 is appropriately witnessed and return to Teachers' Pensions, 11b Lingfield Point, Darlington, DL1 1AX.

Part B: To be completed by the employer and returned without delay.

Section 1: Employment details

1. Establishment number

/

2. Teacher's reference number

/

3. Teacher's surname (one character per box)

4. First name

5. Date of birth (DD/MM/YYYY)

Verified? Yes No

6. Member's final day of paid teaching service

7. Is teacher currently suspended from duty?

If yes, please provide details and attach to form.

Yes No

Notes:

Please provide service and salary details from the date of your most recent monthly submission, up to the member's date of retirement.

Note: For annual allowance calculations Teachers' Pensions need to know the pensionable earnings in each tax year, hence the requirement to provide service and pensionable earnings details for 01 April - 05 April separately.

Please DO NOT submit lines with a start and end date spanning 31 March; this will result in delays in processing the application.

When splitting the service year (e.g 01 April - 05 April, 06 April - 30 April), please ensure that the actual part-time salary paid is the pensionable earnings in the period, not the annual part-time earnings.

Please use the example table below as a reference to complete the table overleaf.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)
FT	123	4567	01/04/19	05/04/19	1/1	27,000					
FT	123	4567	06/04/19	30/04/19	1/1	27,000					W
PTR	123	4567	01/05/19	31/05/19	2/1	25,000	1,000				
PTR	123	4567	01/06/19	30/06/19	2/1	25,000		30		50	W
PTIC	123	4567	01/07/19	31/07/19	3/1	25,000	500		100		

(Continued overleaf)

Part B: To be completed by the employer and returned without delay.

Full-time/Part-time Indicator - Full-time (FT), Part-time Regular (PTR) and Part-time Irregular (PTIC)

Start date and End date - both dates should be in the same calendar month

Role Identifier - this should be provided by MCR employers only and contain a forward slash separating the contract from the role (for example 1/1)

Part-time Earnings - should be the actual part-time earnings for the period stated in the service line

Days Excluded - should only be provided if the member has not worked in the period stated

Additional Pensionable Payments - include Bonus and Out of School Learning Activity (OSLA) payment

Overtime - paid in the service period stated

Withdrawn - a 'W' should be provided where the member has left the Role Identifier contract provided.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)

(Continued overleaf)

Part B: To be completed by the employer and returned without delay.

This certificate must be completed and signed by a responsible officer of the Local Authority, not the school, in respect of all maintained schools, including foundation and voluntary aided schools. In the case of other institutions such as Academies, the certificate must be signed by a responsible officer of the governing body. This cannot be a member of the teaching staff.

Section 2: Certificate

I certify that the service and salary details provided is a true and accurate record of payments made in respect of pensionable Service. I certify that pensionable service will cease or has ceased on the date provided. I appreciate that the absence of a break in pensionable service of at least one day will invalidate this application.

- | | |
|--|------------------------------------|
| 1. Name of contact for admin purposes (in capital letters) | 7. Full address |
| 2. Name of authorised officer (in capital letters) | |
| 3. Position | Postcode |
| 4. Telephone number (inc. STD code and extn.) | 8. Date (DD/MM/YYYY) |
| 5. Fax number | 9. Signature of authorised officer |
| 6. Email address | |

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay 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 money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point
Darlington, DL1 1AX

www.teacherspensions.co.uk

What Happens Next?

- We'll acknowledge receipt of your application, and you can use Task Tracker on My Pension Online to monitor your application.
- We'll upload your retirement benefits documents to My Pension Online. Please note you may not receive these until the day before your benefits are due to be paid.
- You can register for MPO at www.teacherspensions.co.uk/register

How to Complete the Application Form

Notes for the applicant

Part A General

This form should be used to claim your pension before your Normal Pension Age if you are applying for actuarially adjusted benefits. You should not use this form if you are applying for Phased, Premature, Ill-health retirement or Additional Service after Retirement. Separate forms are available if you need to make an application for Phased, Premature, Ill-health or Additional Service after Retirement benefits.

You should NOT use this form if:

- You are applying to take benefits only from arrangements where you have reached Normal Pension Age
- You want to postpone taking benefits from any arrangement where you have not yet reached Normal Pension Age.

You can find information about your Normal Pension Age at www.teacherspensions.co.uk/npa.

This application is in two parts. You must complete Part A and send Parts A and B to your Employer. Your Employer must complete Part B and return both parts of the completed application form together to Teachers' Pensions.

Where you have more than one Employer you should complete a form for each Employer (you may photocopy the first completed Part A for additional Employers). Each of your Employers must complete the Part B and return both parts of the completed application form together to Teachers' Pensions.

If you die within 5 years of your pension coming into payment a Supplementary Death Grant will be paid, constituting 5 years' worth of pension minus pension paid to date. This Guaranteed benefit is subject to a check against your Lump Sum and Death Benefits Allowance (LSDBA) and may mean your beneficiaries are required to pay tax on any amounts over the LSDBA.

Complete the form using black ink and BLOCK CAPITALS, please clearly place cross 'X' for answers that use check boxes.

Part A section 1: Personal details

All of section 1 must be completed.

Teacher's reference number: This is a seven digit number and is your unique teacher reference (you may also know it as your DfE number).

Date of birth: As part of the application process, Teachers' Pensions must verify that a member's age is as given on the application form. If verification of date of birth is required, we will contact you on receipt of your application.

Personal Email address: Please ensure you provide this address as we will use it to send you information about your benefits. You should register on the website www.teacherspensions.co.uk **for My Pension Online** as this is a secure area for communication.

Last date of pensionable teaching service: This is the last day that you are paid up to. This may be different to the last day you work.

(Continued overleaf)

How to Complete the Application Form (continued).

Part A section 2: Payment details

Your pension will be paid into the account you nominate in this section, if you are unsure of any of your bank details you should contact your bank who will be able to help you.

We can only make payments into an account, or joint account, that is in your name.

If you want your pension to be paid into a UK account then please complete questions 1 to 5.

If you want your pension to be paid into a non UK account then please complete questions 6 to 8. Please note that payments made to a non UK account will only be paid in the bank's local currency.

Part A section 3: Survivor details

Please complete all questions that apply.

Part A section 4: Lump sum choices

Please complete all the questions. If a question does not apply to you, you can choose no / not applicable.

If you wish to give up part of your annual pension for a lump sum payment you should choose yes and complete the appropriate details.

You should use the calculators on the website www.teacherspensions.co.uk before making any choices. If you are applying for benefits in more than one Teachers' Pension Scheme arrangement, then you can take different lump sums from each one.

- Question 1 for Final Salary arrangements with a Normal Pension Age of 60. (Normal Pension Age is the age of which retirement benefits are paid in full).
- Question 2 for Final Salary arrangements with a Normal Pension Age of 65.
- Question 3 for the Career Average arrangements.

If you want to take the maximum lump sum then indicate this in the box alongside 'Maximum Allowed' and do not enter a specific amount. If you know how much of your annual pension you want to give up, please enter this amount alongside 'Specific amount p.a' and do not choose 'Maximum Allowed'.

Do NOT enter the lump sum amount that you wish to receive, this could result in an error and delay the processing of your application.

Visit the calculators on our website to see estimates of the reduction that will be made to your annual pension amount when you choose to take a lump sum.

- If you have bought or are buying Additional Pension in the Teachers' Pension Scheme then you have the option to take a lump sum by giving up part of your annual benefit from your Additional Pension. If you wish to do this then complete Question 4.

You cannot use this form to make lump sum choices from AVC's or other pension savings that are not part of the Teachers' Pension Scheme.

Part A section 5: Other details

If you have more than one Employer each Employer must complete their own part B of the form and they should each be submitted with a copy of part A (It is acceptable to photocopy the first completed Part A for subsequent Employers).

Lifetime allowance: The Finance Act 2004 introduced a single tax regime that applied to all UK tax privileged pensions from 6 April 2006. This introduced a 'Lifetime Allowance', which is the total allowable value of benefits (pension and lump sum) from all registered pension schemes. It excluded pensions payable from the state and those where the pension is a dependant's pension. From 6 April 2024 the Lifetime Allowance was replaced by the Lump Sum Allowance and Lump Sum and Death Benefit Allowance. Where a crystallisation event occurred before 6 April 2024 the previous lump sum taken is assumed to be 25% of the former Lifetime Allowance unless a Transitional Tax Free Amount Certificate is provided. Further information can be found at [HM Revenue & Customs - GOV.UK](https://www.gov.uk) (www.gov.uk).

Part A section 6: Payable date

If you have already left teaching when you complete this form, you may select the date that your benefits are payable from. In this case you must choose a date no earlier than 6 weeks after the date you signed the form. This date will only apply to those benefits claimed before reaching Normal Pension Age.

Payable date: This will be the day that your pension is due to start from.

(Continued overleaf)

How to Complete the Application Form (continued).

Part A section 7: Declaration

Please check your answers and read the declaration before you sign and date the form.

Actuarial Adjustment in the Career Average arrangement: if you take your benefits early and your Career Average NPA is greater than 65, the actuarial reduction for each year or part year between age 65 and your Career Average NPA (up to a maximum of 3 years) is set at 3% per annum. Please note that this standard rate of actuarial reduction only applies if you are deemed to have been an 'active' member immediately prior to your early retirement. If you are not deemed to have been 'active' then the adjustment to your pension benefits will be based on the prevailing actuarial factor for your age at retirement and your Career Average NPA.

You must sign and date the form for your application to be accepted.

In order to sign the form on Adobe Acrobat you'll need a digital signature. If you haven't got one, creating one is simple:

1. Click on the signature box
2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
4. Save it to the Windows Certificate Store
5. Enter your name and email address and click 'save'
6. Then select your Digital ID.

This will create a signature block and time stamp and directs you to save the document.

If any section has not been completed the application will be rejected.

Part A section 8: Witness Statement

The Witness Statement only needs to be completed if you have been out of teaching for over 1 year and an employer is not completing Part B.

The signature and details provided must be those of the person who is acting as the witness, the witness must not be a relative of the applicant.

In order to sign the form on Adobe Acrobat you'll need a digital signature. If you haven't got one, creating one is simple:

1. Click on the signature box
2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
4. Save it to the Windows Certificate Store
5. Enter your name and email address and click 'save'
6. Then select your Digital ID.

This will create a signature block and time stamp and directs you to save the document.

Recycling: If you pre-plan to use more than 30% of your retirement lump sums to increase your pension benefits (either directly or indirectly) be warned, HMRC could subject the whole of your lump sum to an unauthorised payment charge of 40%. Members buying out any outstanding Past Added Years or Additional Pension by lump sum close to retirement need to be aware of this and should speak to an independent financial adviser. This rule does not apply if your total lump sums in a 12 month period are less than £7,500. Further details about recycling can be found on the HMRC website www.HMRC.gov.uk. If you are unable to sign the declaration in section 6 on account of a recycling breach, please write to Teachers' Pensions separately.

(Continued overleaf)

How to Complete the Application Form (continued).

Notes for the Employer

Part B: General:

Sections 1 and 2 must be completed.

In order to sign the form on Adobe Acrobat you'll need a digital signature. If you haven't got one, creating one is simple:

1. Click on the signature box
2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
4. Save it to the Windows Certificate Store
5. Enter your name and email address and click 'save'
6. Then select your Digital ID.

This will create a signature block and time stamp and directs you to save the document.

Part B: section 1: Employment details

Members' final day of paid employment: It is not the last day the member worked but the last day that the member will be paid up to the end of their pensionable employment.

Date of Birth: You must confirm that you have verified the applicant's date of birth.

Service details: You must supply all outstanding service details, an example line has been provided on the form to give guidance on how the details should be entered. For further information on completing the service details please refer to the Payroll Guide. You can find the Payroll Guide at www.teacherspensions.co.uk/payrollguide.

Part B: section 2: Certificate

Once all the necessary parts of the application have been completed Part A and Part B of the application form should be returned to Teachers' Pensions together. If any section has not been completed the application will be rejected.

Checklist for the Employer before you return the application to Teachers' Pensions.

1. Have you checked the box to confirm you have verified the applicants' date of birth?
2. Have you provided all outstanding service details?
3. Have you added the official stamp or full address to the certification?

How to Complete the Application Form (continued).

Checklist for members before you send in your application

1. Have you checked your application thoroughly to ensure all questions are answered accurately?
2. Where you are choosing to give up part of your annual pension for a lump sum, have you checked the effect this will have on your annual pension?
3. Have you considered all AVCs and non Teachers' Pension Scheme savings as well as all your teacher's pensions savings in your assessment for the Lump Sum Allowance question 2 (section 5)?
4. Have you signed and dated the application?
5. Where you have been in teaching employment in the past year
 - a. Have you asked your Employer to Complete Part B and return it to Teachers' Pensions?
 - b. Where you have had multiple Employers, have you asked each Employer to complete a Part B?
6. Where you have not been in teaching employment in the past year, has a witness completed the Witness Statement?

The Teachers' Pension Scheme is a statutory scheme. It is administered in accordance with statutory regulations which are available on the [legislation.gov.uk](https://www.legislation.gov.uk) website. The latest set of regulations, SI 2014 No. 512, established the Teachers' Pension Scheme 2015.

Pension Scheme Registry Number 10005209 (2010 scheme and earlier); and 10276733 (2015 scheme)

General Data Protection Regulation (GDPR). The Department for Education (DfE) will use any information you provide in connection with the Teachers' Pension Scheme to administer and operate the scheme and pay 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 money, the DfE may use information it holds to prevent and detect fraud. It may also share information with other organisations that handle public funds. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this application form, the legislation will apply. For more information on how we will use your data, go to www.teacherspensions.co.uk/public/privacy.

Please return to us at:

Teachers' Pensions,
11b Lingfield Point
Darlington, DL1 1AX

www.teacherspensions.co.uk