

Date of receipt:

Short-service annuity

Before completing this form, please read the accompanying notes.
Please complete this form using black ink and in BLOCK CAPITALS.

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

Section 1: Personal details

- | | |
|---|--|
| 1. Teachers' Pensions reference number (example 99/99999) | 7. National Insurance number |
| / | |
| 2. Surname (one character per box) | 8. Contact address |
| | |
| 3. Former surname (if any) | |
| | |
| 4. First name | Postcode |
| 5. Title (please cross 'X', or state if other) | 9. Home telephone number (inc. STD code) |
| Mr Mrs Miss Ms Other | |
| 6. Date of birth | 10. Mobile telephone number |
| | 11. Personal email address |

Section 2: Payment details - Please note that we will only be able to make payments to an account or joint account that is in your name.

- | | |
|--|--|
| 12. Account number | 16. Name of account holder |
| | Please enter the name as it appears on your card |
| 13. Branch sort code | |
| - - | |
| 14. Bank / Building society reference number | 17. Full name and address of UK bank |
| | |
| 15. Building Society roll number | |
| | Postcode |

If you would like to use an overseas bank account please also complete the questions on the following page.

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

Section 2: Payment details (continued)

17. IBAN/Bank and account codes

18. BIC/Swift code

19. Full name and address of overseas bank

Postcode

Please note that payments made to a non UK account will only be paid in the bank's local currency. If you choose to have your pension paid into an overseas bank account, a monthly administration fee of £1 will be applied

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.

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

Section 3: Lifetime allowance

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.

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 or intend to claim pension or lump sum from any other scheme?

Yes

No

Section 5: Declaration

- I acknowledge that because I do not qualify for retirement benefits, or further retirement benefits, I apply for an annuity under the Teachers' Pensions Regulations.
- I agree to inform Teachers' Pensions of any change to my retirement date or to any other details I have provided on this form.
- I agree to inform Teachers' Pensions if I begin employment in teaching within the British Islands at any time during my retirement.
- I am enclosing a copy of my passport (if applicable, see note 4).
- I understand that any overpayment of benefits will be recovered.
- 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 the HMRC recycling rules.
- All the information I have given on this form is true to the best of my knowledge and belief.
- I acknowledge that in the event I do not qualify for retirement benefits, or further retirement benefits, I apply for an annuity payment under the Teachers' Pensions Regulations Annuity payments are calculated as follows: TOTAL CONTRIBUTIONS PAID BY MEMBER + INTEREST/ AGE RELATED FACTOR.
- I acknowledge it is not possible to convert an annuity into a lump Sum. The annuity does not revert to a dependant on death and will increase inline with the Pensions Increase Act 1971.
- I acknowledge that if I'm a re-employed pensioner, the annuity will be added to my normal monthly payment.
- I understand further Information including factors can be found at www.teacherspensions.co.uk/members/planning-retirement

Date

Signature

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

Section 1: Employment Details

1. Establishment number

/

2. Reference number

/

3. Date of birth

Verified? Please cross 'X'.

Yes No

4. Is teacher currently suspended from duty?

Yes No If yes, please provide details and attach to form.

Employment details up to last day of pensionable employment:

Please include details for the previous Scheme year (01 April - 05 April, 06 April - 31 March) and the current year, up to the last day of pensionable employment.

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 | | |

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.

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

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Notes: 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.

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.

Certificate:

Position

Establishment address

Name of contact for admin purposes (in capital letters)

Name of officer (in capital letters)

Postcode

Fax number

Telephone number (inc. STD code and extn.)

Date

Email address

Signed

Please read the accompanying notes before completing this form.

Notes

1. If you are a re-employed pensioner, you should only complete this annuity application form if you do not intend to undertake further employment which would entitle you to a further award of pension benefits.
2. It is not possible to convert an annuity into a lump sum.
The annuity does not revert to a dependant on death and will increase in line with the Pensions (Increase) Act 1971.
3. **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 (www.gov.uk).
4. If you have been out of service for more than 1 year, a copy of your passport must be enclosed when returning this application form.
5. If you are a re-employed pensioner, the annuity will be added into your normal monthly pension.
6. If you made an additional pension election and have not qualified for pension benefits the contributions towards the additional pension, including any lump sum contribution, will form part of the annuity.

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2. Select 'Configure your Digital ID' button
3. Select 'Create a new Digital ID'
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Notes

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?
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?

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