

Date of receipt:

Transfer In

Please read the accompanying notes before completing this form.

You must ensure each section is fully completed by the appropriate party and only then should you submit the full set to Teachers' Pensions.

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

The transfer in process must be completed within 12 months of a member joining or re joining the Teachers' Pension Scheme.

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

Section 1: Personal details

- | | |
|--|--|
| 1. Teacher's reference number (example 99/99999) <input type="text"/> / <input type="text"/> | 8. Contact address |
| 2. Surname (one character per box) | |
| 3. Former surname (if any) | Postcode |
| 4. First name | 9. Home telephone number (inc. STD code) |
| 5. Title (please tick, or state if other) Mr Mrs Miss Ms Other | 10. Mobile telephone number |
| 6. Date of birth (DD/MM/YYYY) | 11. Email address |
| 7. National Insurance number | 12. What is your marital status? (please tick) Married Civil Partnership Unmarried If married or in a civil partnership, enter date of registration |

Section 2: Declaration

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

Signature

Date (DD/MM/YYYY)

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

Part B: To be completed by the current employer. (Please provide full information from the member's first date of employment onwards.)

Section 1: Effective date of election

Once completed return this form direct to the member.

1. Name of member

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

Verified? Yes No

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

4. Establishment number

/

/

Section 2: Employment details (Please complete ALL the boxes below with the relevant details.) This **must** include all service since the member has joined or re joined the Scheme.

| 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 current employer (continued)

| 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) |
|---|--------|------------|--------------------------|------------------------|-----------------|---|---------------------------|------------------|---|---|--------------------------|
| | | | | | | | | | | | |

Section 3: Certificate

The certificate must be signed by a responsible officer of the Local Authority, not school 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.

- Signature of authorised officer**
- Name of authorised officer** (in capital letters)
- Position**
- Date (DD/MM/YYYY)**
- Name of contact for admin purposes** (in capital letters)
- Telephone number** (inc. STD code and extn.)
- 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.

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Part C: To be completed by previous pension provider regarding a potential transfer of benefits.

Notes: This form must be returned to the applicant. The Teachers' Pension Scheme (TPS) is a registered pension scheme and the Pension Scheme Tax Reference (PSTR) numbers are: 00328821RM for the Final Salary arrangement and 00810719RB for the Career Average Arrangement. The TPS will accept liability for any

Equivalent Pension Benefits (EPB). The TPS is contracted out of the state scheme and will accept Guaranteed Minimum Pension (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.

Section 1: Personal details

1. **First name**

2. **Surname** (one character per box)

3. **National Insurance number**

4. **Full name and address of pension scheme**

Postcode

Section 2: Previous scheme

1. **Scheme name**

2. **Scheme address**

Postcode

3. **Club scheme?** Yes No **If no, go to section 3**

If yes, please attach your calculation and provide the dates of contracted out membership, if applicable, below.

4. **Dates of contracted out membership, if applicable**

Start date (DD/MM/YYYY)

End date (DD/MM/YYYY)

Section 3: Non-club occupation scheme

1. **Non-club occupation scheme**

Please complete the details below and also the statement on page 6)

2. **Is the Scheme HMRC registered?** (please tick)

Yes No

If Yes, please enter PSTR Reference Number

3. **Contracted in status** (please tick)

Contracted in Contracted out

4. **Scheme type** (please tick)

Money purchase Salary related

5. **Dates of scheme membership**

Start date

End date

6. **Dates of contracted out membership***

Start date (DD/MM/YYYY)

End date (DD/MM/YYYY)

* Please leave blank if not applicable.

(continued overleaf)

Part C: To be completed by previous pension provider regarding a potential transfer of benefits. (continued)

Section 3: Non-club occupation scheme (continued)

7. Transfer value statement

| | |
|--|--|
| Total transfer value | Date last revalued (DD/MM/YYYY) |
| Post 5 April 1997 transfer value (protected rights) | Rate of GMP revaluation |
| | Fixed Full Ltd |
| Weekly GMP amount (pre 6 April 1988*) | ECON number |
| Weekly GMP amount (post 6 April 1988*) | SCON number |

Where the member has more than one CETV, please duplicate this page to submit additional information

8a. Personal pension/Stakeholder/Section 32 buy out

Please complete the details below. You do not need to complete section 4.

8b. Section 226/620 retirement annuity policy or AVC

Please complete the details below. You do not need to complete section 4.

9. Is the scheme HMRC registered? (please tick)

Yes No

If Yes, please enter PSTR Reference Number

10. Dates of policy

Start date (DD/MM/YYYY)

End date (DD/MM/YYYY)

* Please leave blank if not applicable.

11. Dates of contracted out membership*

Start date (DD/MM/YYYY)

End date (DD/MM/YYYY)

12. Transfer value statement

Total transfer value

Post 5 April 1997 transfer value (protected rights)

Date last revalued (DD/MM/YYYY)

Appropriate Scheme Contracted Out Number

1. Scheme name

2. Signature

3. Date (DD/MM/YYYY)

4. Name (in capital letters)

5. Position

6. Name of contact for admin purposes (in capital letters)

7. Telephone number (inc. STD code and extn.)

8. Email address

Part C: To be completed by previous pension provider regarding a potential transfer of benefits. (continued)

Section 4: 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). If rights have not been equalised or you will not indemnify the TPS to cover any loss if the equalisation is insufficient, the transfer cannot proceed.

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

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

Have not been equalised between male and female members of the scheme of otherwise like circumstances

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.

Have not been calculated as the better of those available to male or female members of the scheme of otherwise like circumstances.

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.

We will not make good any deficiency in our transfer value representing the member's benefits

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.**

1. Scheme name

2. Signature

3. Date (DD/MM/YYYY)

4. Name (in capital letters)

6. Position

7. Telephone number (inc. STD code and extn.)

8. Email address

Please sign, date and return this form to the applicant for and on behalf of the Trustees of the Pension scheme named above.

Please read these notes before completing this application.

How to Complete the Application Form.

Notes: 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.

Notes for the applicant

General: How to apply for a Transfer-In Estimate

A Transfer In Estimate form must be completed if you are considering or want to transfer in benefits from your previous pension. It's designed to collect information from you, your employer and your previous scheme. It's your responsibility to organise the collection of all of the information required.

So once you've completed Part A, which is information about yourself, you should then ask your previous scheme administrators to complete the information required in Part C. We advise you to send a copy of these notes to each party.

You should ensure that Part C is returned to you and is complete before sending all parts to us for processing. Once received by TP, you can monitor progress by going to 'Track My Case' in the secure area of our website www.teacherspensions.co.uk.

Eligibility

If you want to transfer benefits from a previous pension scheme into the Teachers' Pension Scheme you must submit an application to proceed within 12 months of entering pensionable teaching service.

Completing this form does not constitute an application to proceed with a transfer into the Teachers' Pension Scheme (TPS), it only provides the information to allow Teachers' Pensions to estimate the potential value of pension benefits transferred into the TPS.

If, after being provided with the estimate, you wish to transfer pension benefits into the TPS you must **contact your previous scheme, within 12 months after entering pensionable service in your current TPS scheme arrangement, and advise them to proceed with the transfer.** Your previous scheme will likely provide a form for this purpose, usually when they provide you with details of your guaranteed transfer value. Applications to proceed that are not made within 12 months of entering pensionable service in your current TPS scheme arrangement will result in the transfer-in being rejected.

The transfer process

There are three types of scheme categories:

- Club (broadly public sector)
- Non-club other occupational schemes
- Individual pension policies

It's important to remember that submitting an application doesn't commit you to transferring your previous pension credit into the TPS. Instead, we'll use the information supplied by your employer and previous pension scheme to produce a quotation that'll be sent to you to consider. This is called an offer of service. It expresses what the transfer value from your previous scheme will purchase in the TPS. You then decide whether to accept the offer. If you want to go ahead, the transferred-in service will be added to the pensionable service you accrue in the TPS. The aggregated total will be used in the calculation of your pension benefits.

Please be aware that you can't transfer Additional Voluntary Contributions (AVCs), or Free Standing AVCs associated with your previous scheme, into the TPS. However, it may be possible for these to be transferred to Prudential, the AVC provider for the TPS.

(continued overleaf)

How to Complete the Application Form. *(continued)*

Notes for the applicant *(continued)*

Part A: section A1:

Information about the applicant, it should be completed in all cases.

Teachers' 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: If verification of date of birth is required, we will contact you on receipt of your application

Part B: To be completed by your current employer

Part C: To be completed by the previous pension provider

Part C: section 2: All relevant information must be completed for club transfers by the previous pension provider

Part C: section 3: All relevant information must be completed for non-club transfers by the previous pension provider

Part C: section 4: Non-club occupation schemes must complete this section confirming that they will make good any deficiency. The previous provider must sign and date the form for the application to be accepted.

Notes for the Previous Pension Provider

If you wish to provide the required information using your own form, please ensure that all information requested within part C is included within the application.

Failure to provide the required information dictated within Part C may result in delays in processing the application.

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