

Date of receipt:

Request to Transfer Pension Benefits

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

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

3. **Former surname** (if any)

4. **First name**

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5. **Title** (please tick, or state if other)

Mr Mrs Miss Ms Other

6. **Date of birth**

D	D	M	M	Y	Y	Y	Y
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7. **National Insurance number**

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8. **Home telephone number** (inc. STD code)

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9. **Mobile telephone number**

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10. **Personal email address**

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11. **I am interested in** (please tick)

- A transfer to another registered Defined Benefits scheme
- A transfer to a scheme offering flexible access to benefits (Defined Contributions). Please note this is only available if you have more than 3 months service but have not qualified for pension benefits in the Teachers' Pension Scheme

12. **Applicant's address**

Postcode

13. **Name and address of new scheme or Independent Financial Advisor**

Postcode

14. **Date started in new scheme** (If a date isn't provided your transfer value will be calculated on a non-Club basis)

D	D	M	M	Y	Y	Y	Y
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15. **If you have entered into an Additional Voluntary Contributions arrangement with the Prudential or any other insurance company or financial institution, please provide the name and address of the organisation**

Postcode

(continued overleaf)

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

Now please sign and date the form

Signature

Date

D	D	M	M	Y	Y	Y	Y
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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 former employer of the person named in Part A.

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

Notes: The details shown below can be submitted via the Secure Transfer Utility (STU)

Section 1

Please show service and salary details (in accordance with the instructions for submitting details of the Annual Return) for the last two years' pensionable, or 'excluded' employment.

LA	School / Establishment No.	Salary Scale	Full (F) or Part (P) Time	Start date DD / MM / YY	End date DD / MM / YY	Annual Salary Rate (£)	Part Time Salary Paid (£)	Days Excluded	Incremental Point	Salary Safeguarded	These columns are to be completed by LA's, Universities and Voluntary Colleges only				Incremental Enhancement Local Scale Addition	Leaver Indicator 'W'
											London Allowance (IAO or F)	Social Priority (1 or 2)	Social Priority (6, 7, 8 or 9)	Overtime (gross amount (£))		

Enter the corresponding details of the superannuation contribution

Start Date DD/MM/YY	End Date DD/MM/YY	Contributable Salary	Contributions	Additional Contributions	Reason e.g. Family Benefits, Added Years, Reinstatements etc. (please enter seperately)

Section 2: Employer's declaration. To be completed in all cases. I certify that the details in Part B are correct.

1. Signature of authorised officer

2. Name of authorised officer (in capital letters)

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

3. Date

D	D	M	M	Y	Y	Y	Y
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5. Email address

Please read the accompanying notes before completing this form.

How to Complete the Application Form.

Notes for the applicant

Part A: General

This form should only be completed if you're thinking of transferring your pension benefits to a Defined Benefits scheme, or, if you have not qualified for benefits but have more than 3 months service in the Teachers' Pension Scheme, a Defined Contributions scheme. The receiving scheme must be registered with Her Majesty's Revenue and Customs (HMRC), or be a Qualified Registered Overseas Pension Scheme (QROPS). From 1 April 2015 transfers out of unfunded public sector schemes such as the Teachers' Pension Scheme can only be to schemes offering Defined Benefits, except in the circumstance outlined above.

Please check with your proposed new scheme if they have a time limit on accepting transfers from other schemes.

What you need to know

- This form should only be completed if you wish Teachers' Pensions to investigate the possibility of transfer to another Pension Provider on your behalf
- Before you complete Part A, please read the guidance above carefully. Please note that the completion of this form will not commit you in any way.
- After completing part A:
 - **If you ceased pensionable employment within the last two years**, please forward this form to your last employer
 - **If you ceased pensionable employment more than two years ago**, please return the form to Teachers' Pensions, 11b Lingfield Point, Darlington, DL1 1AX
- Please complete this form using CAPITAL letters
- Only original copies of this document will be accepted.

Part A

To be completed by the applicant in all cases

Part A: section A1

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

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

Part B

To be completed by the former employer of the person named in Part A.

Part B: section 1

Please show service and salary details (in accordance with the instructions for submitting details of the Annual Return) for the last two years' pensionable, or 'excluded' employment.

Part B: section 2

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

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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