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											
	Teacher's 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 tick, or state if other)	11.	Personal email address for all future correspondence								
	Mr Mrs Miss Ms Other		(We will send details of your benefits to your email address)								
6.	Date of birth										
	D D M M Y Y Y Y										
7.	National Insurance number										
Sec	tion 2: Payment details										
12.	Account number		Full name and address of UK bank								
13.	Branch sort code		<u> </u>								
14.	Bank / Building society reference number										
			Postcode								
15.	Building Society roll number	17.	IBAN/Bank and account codes								
16	Name of account holder										
10.	Name of account notice	18	BIC/Swift code								
		10.	bic/swirecode								
(continued overleaf)											

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Part A: To be completed by the applicant in all cases. (continued)
Section 2: Payment details (continued) Full name and address of Overseas bank Postcode
Section 3: Lifetime allowance Will the total of your annuity from the Teachers' Pension Scheme (TPS) and any other pensions currently in payment at retirement exceed £45,000 per annum? 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 my existing benefits and benefits from the Teachers' Pension Scheme at retirement exceed the Lifetime Allowance at retirement, and I have no transitional protection certificate, the Lifetime Allowance charge will be paid and my benefits reduced. 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.
Date D D IN IN T T

Data Protection Act 1998. 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.

Please return to us at:

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

www.teacherspensions.co.uk

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Part B: To be completed by the employer and returned without delay.																						
1. Establisment number 2. Refere							ence n	ce number 3. Date of birth							\	Verified?						
		/					/					D D	М	M Y Y	YYY	es No						
4. Is teacher currently suspended from duty? Employment details up to last day of pensionable employment:																						
Yes	Ν	lo I	f yes, pleas	e provide	details a	nd attac	ch to fo	orm.														
To prevent delays in processing retirement applications, service and salary details should be provided in the table below. Please include details for the previous financial year and the current year up to the last day of pensionable employment. No lines of service details should span 31 March. For members who are in concurrent service in addition to recording the service below please also provide a breakdown of this service on a separate sheet. When a part-time salary entry is made below, the amount of salary actually paid to the teacher should be entered and a new line used when a change in the full-time annual rate occurs. An entry should also be made in the special classes column for part-time members.																						
								7								Allowances						
Salary	scale	Full/Part- time (F/P)	Start da (dd/mn		End (date mm/yy)			e annual salar inc. Pensional ce)	y	Actual part-tim salary p	ne paid (£)		Days excluded	Enter S if salary is safeguarded	London Additions (I. A, O or F)	Social Priority (1, 2, 3or 4)	Special classes (7 or 8)	Other allowances (£)	Supp field	School No or Employment code	
-	+											4								-		
	+									-	-			•						-		
	+										•											
													1									
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.																						
I certify that the service and salary details provided is a true and accurate record of payments made in respect of pensionable employment. I certify that pensionable employment will cease or has ceased on																						
the date shown above. I appreciate that the absence of a break in pensionable employment of at least one day will invalidate this application. Signed Name of officer (in capital letters) Establishment address																						
Position							Te	elephone	numb	er (inc	. STD co	ode an	d extn.)									
Name of contact for admin purposes (in capital letters)								Telephone number (inc. STD code and extn.)								Post	tcode					
Date							Email address									Fax number						
D D M M Y Y Y																						



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 applies to all UK tax privileged pensions from 6 April 2006. This new regime introduced a 'Lifetime Allowance', which is the total allowable value of benefits (both pension and lump sum) from all registered pension schemes. This excludes pensions payable from the state.

The Lifetime Allowance (LTA) will be set at the following levels for the coming tax years:

2014 / 2015 £1,250,000

To see whether you are affected, the following formula should be applied to your benefits:

(Annual Pension x 20) + Lump Sum

Lifetime allowance

x 100 = LTA%

If the percentage exceeds 100% you'll be liable for the LTA charge unless you have a transitional protection certificate.

If your benefits from all registered pension schemes currently in payment (and your TPS annuity which is coming into payment is less than £45,000 per annum) please tick the 'No' box. If your benefits in payment and about to come into payment on the same date as your teacher's pension exceeds £45,000 per annum, please tick the 'Yes' box. A further form will then be forwarded to you to complete. If an LTA charge is due, then TP will account for this by reducing your benefits.

- **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.

Data Protection Act 1998. 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.

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