

Ill-Health Payment Application

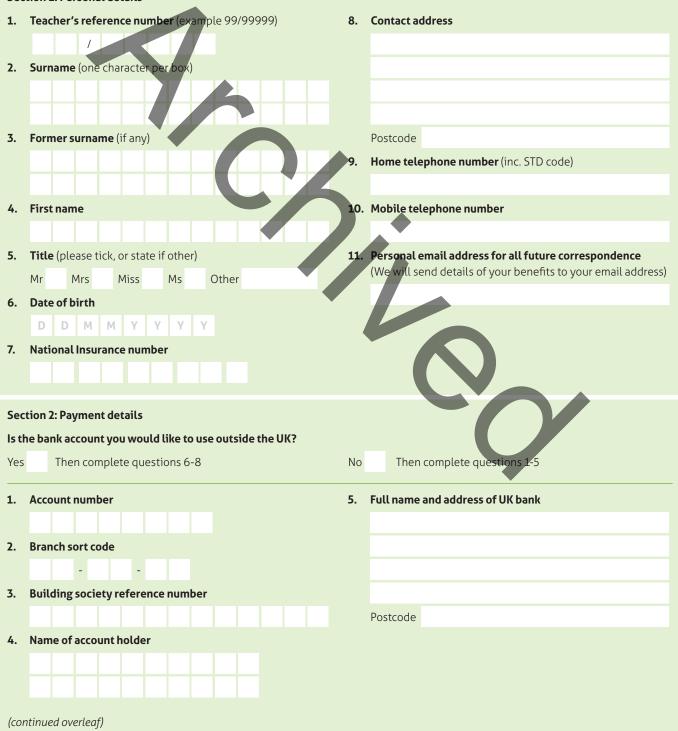
As you have been accepted to retire on the grounds of Ill Health, further information is required to enable Teachers' Pensions to make payments to you.

What you need to know:

Please return the form to Teachers' Pensions, Ill Health Team, Mowden Hall, Darlington, DL3 9EE 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





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

Section 2: Payment details (continued)

- 6. IBAN/Bank and account codes
- 7. BIC/Swift code

8. Full name and address of Overseas bank

Postcode

Section 3: Lump sum choices

If you were a member of the scheme before 1 January 2007 and had pensionable employment on or after that date you can convert part of your pension to increase your lump sum so it's up to 25% of the value of your benefits. For each £1 of pension commuted, £12 of lump sum will be paid. You can work out the calculations more easily on our website: www.teacherspensions.co.uk/calculators.

To find out how much you much lump sum you may take, go to www.teacherspensions.co.uk before completing this section.

Notes: Once your application is received by us, your decision is irrevocable. If you do not have any pensionable service on or after 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 lum sum.

1. If you are a member of the Scheme prior to 1 January 2007 and with pensionable service on or after this date.

You will automatically receive a lump sum of 3 times your pension. You have the option to take an additional lump sum by giving up part of your annual pension. **Do you wish to do this?**

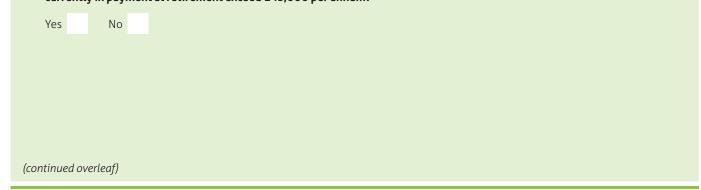
Yes No or not applicable

If yes, please indicate from which annual pension(s) you wish to convert from **and how much you want to give up.** If you've been accepted for an Enhanced Ill-Health retirement, your pension is calculated on two levels known as Accrued and Enhanced. **If you wish to convert from one or both levels, please specify in the boxes below** the amount per year that you wish to give up or indicate if you wish to give up the maximum allowed on each level.

	Accr	ued Retiremen	t Pension		Enhanced Retireme							
	or	ount per year imum allowed	£		Amount per year or Maximum allowed	£	\mathbf{V}					
2.	If you are a member of the Scheme joining on or after 1 January 2007 with no pensionable service prior to 1 January 2007. 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	No	or not app	licable								
	If yes, please indicate from which annual pension(s) you wish to convert from and how much you want to give up. If you've been accepted for an Enhanced III-Health retirement, your pension is calculated on two levels known as Accrued and Enhanced. If you wish to convert from one or both levels, please specify in the boxes below the amount per year that you wish to give up or indicate if you wish to give up the maximum allowed on each level.											
	Accrued Retiremen		Pension		Enhanced Retirement Pension							
	or	ount per year imum allowed	£		Amount per year or Maximum allowed	£						
(cor	ntinue	ed overleaf)										



Part A: To be completed by the applicant in all cases. (continued)											
Section 3: Lump sum choices (continued)											
3.	If you are a member of the Scheme joining the Career Average arrangements on or after 1st 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	Yes No or not applicable									
	If yes, please indicate from which annual pension(s) you wish to convert from and how much you want to give up. If you accepted for an Enhanced IIt-Health retirement, your pension is calculated on two levels known as Accrued and Enhance wish to convert from one or both levels, please specify in the boxes below the amount per year that you wish to give up indicate if you wish to give up the maximum allowed on each level.										
	Accrued R	d Retirement Pension		Enhanced Retireme	nt Pension						
	Amount pe or Maximum		£	6	Amount per year or Maximum allowed	£					
4.	 Additional Pension lump sum choices. You only need to answer this question if you have bought or are buying any additional pension benefits. This question does not apply to AVC's that you hold outside the arrangements. Do you wish to give up part of your additional pension annual benefits in order to take a lump sum? 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 or you can indicate that you wish to give up the maximum that is allowed. 										
		Amount or	per year	£							
		Maximu									
			Additional pension with a normal pension age of 65								
		Amount or		£							
			n allowed								
		Additional pension with a normal pension age of over 65									
		Amount or	per year	£							
		Maximur	n allowed								
	No	or not ap	plicable				~				
Section 4: Lifetime allowance											
1.	Will the total of your pension before conversion (see Section 3) from the Teachers' Pensions Scheme and any other pensions currently in payment at retirement exceed £45,000 per annum?										





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

Section 5: Declaration

- I have ceased all teaching employment in England and Wales
- 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 immediately if I begin any employment at any time during my retirement. I understand that failure to do this may result in an overpayment of benefits which will be recovered.
- I understand that if my existing benefits and benefits from the Teachers' Pension Scheme exceed the Lifetime Allowance at retirement, and taking account of any transitional protection certificate, the Lifetime Allowance charge will be paid and my benefits reduced.
- I confirm that Lam not in breach of Her Majesty's Revenue & Customs (HMRC) recycling rules. If you are intending to use30% or more of your lump sum to increase your pension benefits, this could result in Her Majesty's Revenue & Custom (HMRC) subjecting the whole of your lump sum to an unauthorised payment tax charge of 40% and a further 15% surcharge if the value of unauthorised payments exceeds 25% of your rights in the scheme. This recycling rule will not affect you if your lump sum does not exceed 1% of the Lifetime Allowance which is explained further in these notes. More information on the recycling rule is available on the HMRC website, **www.hmrc.gov.uk.**



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 9AX

www.teacherspensions.co.uk