Date of receipt:

Teachers' Pensions

Armed Forces Reservist: Options for Teachers

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

   /

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

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

4. **First name**

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

   Mr Mrs Miss Ms Other

6. **Date of birth** (DD/MM/YYYY)

7. **National Insurance number**

8. **Contact address**

   Postcode

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

10. **Mobile telephone number**

11. **Personal email address**

(continued overleaf)

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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Date of receipt:

Teachers' Pensions

Teacher serving as Armed Forces Reservist

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

If you are a Reservist, there are two options to maintain your future pension accrual provided by the Ministry of Defence:

Firstly, on being called up, the Ministry of Defence gives you the option to:

OPTION (1) - Join the Armed Forces Pension Scheme

If you have joined the Armed Forces Pension Scheme as a Reservist please tick here. ☐

OPTION (2) - Contributions paid by the Ministry of Defence to your teaching employer to maintain your accrual in the Teachers' Pension Scheme.

There are overriding provisions for any Reservist to maintain their pension accrual in their employer's pension scheme while they are called up for 'permanent service'. These are arrangements under Regulation 5 of the Financial Assistance Act 2005 (859).

If the Ministry of Defence are paying contributions to the TPS on your behalf, tick here. ☐

If you choose this option please provide the following: (please tick, if attached)

- A copy of the Ministry of Defence Reservist Option Form validating that choice ☐
- Employer service with Ministry of Defence salary ☐
- Contributions confirmed as having been paid ☐
- Employer acceptance letter issued ☐
- Member acceptance letter issued ☐

Please note for the arrangements laid out in OPTIONS (1) and (2) you will not need to complete the rest of this TPS election form. Please submit this document to Teachers' Pensions at the address below.

The TPS election is completely separate from the provisions available for Reservists offered by the Ministry of Defence.

OPTION (3)

If neither option (1) nor (2) apply, but you wish to make an election under the provisions of the TPS please tick here. ☐

Under this arrangement, Teachers' Pensions will invoice you directly on an annual basis for member contributions only which will retain your membership of the TPS. No employer contributions are required.

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Election for Payment of Contributions during an absence from pensionable service under the Teacher's Pension Regulations

Please do not complete this section if you have:
1) Joined the Armed Forces Pension Scheme, or
2) You have elected to opt out of the Armed Forces Pension Scheme and applied to the Ministry of Defence to make contributions to the Teachers' Pension Scheme for the period of your mobilisation.
See Notes for further details.

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

1. Period (commencing from the first day following cessation of pensionable employment) **for which member contributions only are to be paid.** (DD/MM/YYYY)

to

2. Details of Forces Service

Rank:

Number:

Unit:

Section 2: Election

- I elect to pay member contributions to Teachers' Pensions in respect of the period specified in the Teachers' Pension Scheme Regulations and any contributions relating to Scheme flexibilities.
- I confirm I have not joined the Armed Forced Pension Scheme 2015
- I confirm I have not elected for employer and member contributions to be paid to my teaching employer by the Ministry of Defence to continue any membership of the Teachers' Pension Scheme under regulation 5(3) of the Reserve Forces (Call-Out and Recall) (Financial Assistance) Regulations 2005
- The details I have provided are true to the best of my knowledge and belief.

Signature

Date (DD/MM/YYYY)

If you have entered into additional voluntary contribution arrangements with the Prudential, please contact them direct with regard to the payments to your policy during the election period.

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

Part B: To be completed by the last employer.

Section 1: Teacher's details

1. **Establishment number**

   /

2. **The last day of teacher's pensionable employment was:**

   (DD/MM/YYYY)

3. **Was the last period of pensionable employment part-time or full-time? If part-time, state % of full-time employment.**

   Full-time Part-time

   of full-time employment

Section 2: Employment details

Please state the annual rate of pensionable earnings in the final pay period prior to serving as a Reservist, defined as "notional salary" in Regulation 33 of the Teachers' Pensions Scheme Regulations 2014. If this teacher has elected to pay contributions on a former higher salary then the salary must be stated.

Salary scale	Full/Part-time (F/P)	Start date (dd/mm/yy)	End date (dd/mm/yy)	Full-time annual salary rate (£) (inc. Pensionable Allowance)	Actual part-time salary paid (£)	Days excluded (other than part-time)	Is salary safeguarded? (S)

Certificate

I certify that the above information is correct.

1. **Signature**

2. **Name of authorised officer** (in capital letters)

3. **Position**

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

5. **Date (DD/MM/YYYY)**

6. **Full address**

   Postcode

Please forward the completed form to the your Adjudicators office at the relevant Service or Reserve Force.

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

Part C: To be completed by the Ministry of Defence.

Section 1: Certification

You will be aware that the above named teacher has been called to undertake a period of service as an Armed Forces Reservist.

In accordance with the provisions of the Teachers' Pension Scheme 2014, a teacher called up as a Reservist can elect to pay member contributions while absent from their teaching post. As the member is continuing their membership of the Teachers' Pension Scheme, contributions should not be deducted from the salary earned with the MOD. Please note this is different from the pension arrangement which exists for Reservists under the Reserve Forces (Call-Out and Recall) (Financial Assistance) Regulations 2005.

To enable us to determine the level of pension contributions to be paid by the member during the current period of mobilisation, could you please certify:

1. **First day of military service (DD/MM/YYYY)**

2. **Last day of military service (DD/MM/YYYY)**

3. **The annual rate of the member's pay throughout the period of mobilisation**

Certificate

I certify that the above information is correct.

1. **Signature**

2. **Date (DD/MM/YYYY)**

3. **Telephone number** (inc. STD code and extn.)

4. **Full address**

Postcode

Please do not forward any payments with this application form.
The member will be notified directly of any amounts due.

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Background to arrangements for Reservists

There are several options available to members to maintain their pension provision while serving as a Reservist in the Armed Forces.

(1) Enrolment into the Armed Forces Pension Scheme 2015

All employees, including teachers, who are called up as Reservists will be offered membership of the Armed Forces Pension Scheme 2015. Under these arrangements, the Ministry of Defence arrange for the equivalent member and employer contributions to be remitted to the person's civilian employer as set out in regulation 5 of "The Reserve Forces (Call-out and Recall) (Financial Assistance) regulations".

(2) Maintenance of contributions into the Teachers' Pension Scheme via The Reserve Forces (Call-out and Recall) (Financial Assistance) regulations (2005/859)

Alternatively, if opted out of the Armed Forces Pension Scheme 2015, the Ministry of Defence can arrange for contributions deducted from your Reservist salary and the relevant employer contributions that would have been paid to the Teachers' Pension Scheme to be forwarded to your teaching employer. This will enable you to maintain your membership of the Teachers' Pension Scheme.

If you take this option, please arrange for copies of the documents referred to in the Checklist on Page 2 to be forwarded to Teachers' Pensions, which confirms that you wish to proceed with Option (2).

(3) Reservist contributions payable via an election under the Teachers' Pension Scheme Regulations

If you choose either Option (1) or Option (2) above, the election under Option (3) is not applicable.

If you wish to make an election under option (3) under the Scheme's provisions for Reservists, you will be invoiced for your teacher's ordinary contributions on an annual basis. The invoice will be raised and sent to you by Teachers' Pensions. This election does not require any employer contributions to be made and a member's full service will be credited.

As far as the future accrual of benefits is concerned, this will be linked to your salary at the point of taking up permanent service. This salary is then indexed in line with Pensions Increase factors each April and standard salary increases you would have had if you had remained in teaching employment, until you return to your teaching employer.

If neither Option (1) nor Option (2) apply, you will be invoiced annually, although you can choose to make the election within 6 months of returning to teaching service, in which case, all arrears of member contributions will be payable.

Contributions payable to the Scheme will also include the continuation of any monthly contributions to cover Additional Pension, Buy Out of the standard actuarial reduction and Faster Accrual where a relevant election was made prior to taking up permanent service.