

Where possible please complete this form through My Pension Online.

The easiest way to submit your retirement application is by logging on to My Pension Online and navigating to Member Portal > My Requests > Manage Request > Retirement requests . Alternatively, to submit a paper version, please complete and return this application by post to Teachers' Pensions, Unit 5, The Beehive, Lingfield Point, Darlington, DL1 1RW , we will initiate the request for your employer to complete Part B as appropriate.

Notes:

- You should read the 'Notes' section before completing this form.
- You should ensure that you complete ALL sections and questions in the form (unless otherwise stated). If you do not supply the required information this may result in delays in processing your application and subsequently delay the payment of retirement benefits.
- You may find it useful to visit our retirement page at www.teacherspensions.co.uk/members/planningretirement for more information about your benefits and how to apply for them.

Part A - To be completed in BLOCK letters by the applicant in all cases.

Section 1: Personal details

1. Teacher reference number

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2. Surname

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3. Former surname (if any)

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4. First name

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

Mr ☐ Mrs ☐ Miss ☐

Ms ☐ Other

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

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7. National Insurance number

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8. Contact address

Postcode

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9. Home telephone number (inc. STD code)

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10. Mobile telephone number

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11. Email address

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Section 2: Payment details

Your benefits will be paid into the account you nominate below. Please note that we will only be able to make payments to an account or joint account that is in your name. If you already have pension benefits in payment, then please be aware that all benefits payable to a member must be to the same account.

Do you want your benefits to be paid into a UK bank account?

Please note that payments made to overseas bank accounts will only be paid in the bank's local currency. Payments to an overseas bank account will incur a £1.00 administration fee on each transaction.

Yes ☐ Then complete questions one to five in this section.

No ☐ Then complete questions six to 19 in this section.

1. Branch sort code

2. Your bank or building society account number

3. Building society reference number

4. Name of account holder

5. Full name and address of UK bank

Postcode

If your bank is outside of the UK, please provide the following:

6. Payee Name

7. Payee Type

☐

Individual

☐

Company

8. Payee country

12. Payee BIC or Swift code

13. Full name and address of overseas bank

Postcode

14. IBAN/Bank and account codes

15. Account Number

16. Account Type

☐

Current/Cheque

☐

Savings

17. Bank Code

18. Branch Code

19. Tax and Identification details* (if applicable)

19A. Tax identification number

9. Payee currency**10. Payee preferred currency****11. Payee address**

Postcode

19B. Tax identification type**19C. Tax identification issue country**

*Tax & Identification details are required for payees in certain countries, including Argentina, Brazil, Chile, China, Colombia, Costa Rica, Israel, Kenya, Peru, Poland, Turkey, and Uruguay.

Section 3: Other Details

Lifetime Allowance - For more information regarding Lifetime Allowance assessment please refer to www.hmrc.gov.uk.

Although the Lifetime Allowance charge was abolished from the 2024-25 taxable year, pension schemes must continue to operate Lifetime Allowance checks when paying benefits.

Therefore, if the aggregate of all your annual pension(s) in payment and any going into payment including the Teachers' Pension Scheme exceeds or will exceed £35,000 per annum in total then you must complete the Lifetime Allowance Charge Assessment form. Failure to do so may result in delays in processing your pension award. Please tick the relevant box based on whether you are affected or not.

Yes ☐ No ☐

Section 4: Declaration

Please ensure you read all of the declaration statements below before you date and sign this section.

- I acknowledge that because I do not qualify for retirement benefits, or further retirement benefits, I am applying 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 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 HM Revenue and Customs (HMRC) recycling rules. For further information please refer to www.hmrc.gov.uk.
- All the information I have given on this form is true to the best of my knowledge and belief.
- I understand that under the Teachers' Pensions Regulations Annuity payments are calculated as follows: Total contributions paid by member + interest / age related factor.
- I acknowledge that it is not possible to convert an annuity into a lump sum. The annuity does not revert to a dependent on death and will increase in line with the Pensions Increase Act 1971.
- I acknowledge that if I'm a re-employed pensioner, the annuity will be added to my normal monthly payment.
- I understand that further information including factors can be found at www.teacherspensions.co.uk/members/planning-retirement.

Signature

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Date (DD/MM/YYYY)

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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 read the accompanying notes before submitting this form.

What Happens Next?

The easiest way to check the progress of your application is by logging on to My Pension Online and navigate to Member Portal > My Requests > Transaction History. If you have not registered to My Pension Online, we will notify you via post.

Notes for the applicant

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 dependent on death and will increase in line with the Pensions (Increase) Act 1971.
3. Lifetime Allowance: When answering the lifetime allowance question, you must include any income from AVC's and non-Teachers' Pension Scheme pensions as well as all your Teachers' Pensions, but not your state pension. You can obtain a benefit statement for the Teachers' Pension Scheme using My Pension Online (MPO), please visit our website at www.teacherspensions.co.uk. You can find more information regarding Lifetime Allowance tax charges at www.hmrc.gov.uk.
4. If you are a re-employed pensioner, the annuity will be added into your normal monthly pension.
5. If you made an additional pension election and have not qualified for pension benefits the contributions towards the additional pension, including any lump sum contribution, will form part of the annuity.