

Death notification and application for death benefits

Please complete this form in BLOCK letters and return to us by post at Teachers' Pensions, Unit 5, The Beehive, Lingfield Point, Darlington, DL1 1RW.

Notes:

- You should read the section 'How to complete the application form' before completing this form.
- Please be aware we are not part of the 'Tell Us Once' service.

Part A: Notification of the deceased member details:

Section A1: About the deceased member. To be completed in all cases.

1. Teacher reference number

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2. Surname

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)

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7. National Insurance number

8. Date of death (DD/MM/YYYY)

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9. What was the member's marital status? (please tick)

- ☐ Single
- ☐ Married
- ☐ Divorced
- ☐ Civil Partnership
- ☐ Separated
- ☐ Widow or Widower
- ☐ Partnership dissolved
- ☐ Have a nominated partner

10. Date of marriage/civil partnership registration (DD/MM/YYYY)

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11. Employment: Only complete if the member died in pensionable teaching employment, or within 12 months of leaving

Last employer

Contact name

Telephone number

Employee number

Section A2: Your details. To be completed in all cases.

1. Surname

2. Former surname (if any)

3. First name

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

Mr ☐ Mrs ☐ Miss ☐

Ms ☐ Other ☐

5. Relationship to the member

6. Contact address

Postcode

7. Home telephone number (inc. STD code)

8. Mobile telephone number

9. Personal email address

Part B: Applying for a lump-sum death benefits/residual pension/dependant's pension.

To be completed in all cases.

Notes: Providing this information does not guarantee an entitlement to lump-sum Death Benefits.

Section B1: This section should be completed with the spouse or civil partner's details. If there is no spouse or civil partner, the informant/applicant/personal representative of the estate should complete it using their own details.

1. Surname

9. Home telephone number (inc. STD code)

2. Former surname (if any)

10. Mobile telephone number

3. First name

11. Personal email address

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

Mr ☐ Mrs ☐ Miss ☐

Ms ☐ Other ☐

12. Name of UK bank or building society

5. Relationship to the member

13. Name of account holder

6. Contact address

14. Branch sort code

Postcode

15. Account number

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

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16. Bank / building society reference number (where applicable)

8. National Insurance number

If your bank is outside the UK, please provide:

17. Payee Name

18. Payee Type

☐ Individual ☐ Company

19. Payee country

20. Payee currency

21. Payee preferred currency

22. Payee address

Postcode

23. Payee BIC or Swift code

24. Full name and address of overseas bank

Postcode

Please note that payments made to the overseas bank accounts will only be paid in the bank's local currency.

25. IBAN/Bank and account codes

26. Account Number

27. Account Type

☐ Current/
Cheque ☐ Savings

28. Bank Code

29. Branch Code

30. Tax and Identification details* (if applicable)

30A. Tax identification number

30B. Tax identification type

30C. 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 B2: About the solicitor.

1. Are solicitors dealing with the estate, or acting on your behalf? (If yes, complete this section then proceed to section B3. If no, proceed to section B3.)

Yes ☐ No ☐

2. Solicitor's name and address

Postcode

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3. Solicitor's telephone number (inc. STD code)

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4. Are the solicitors applying for Grant of Probate?

Yes ☐ No ☐

5. Would you like Teachers' Pensions to deal with the solicitors?

Yes ☐ No ☐

6. Would you like Teachers' Pensions to pay the lump-sum death grant / pension residue direct to the solicitors?

Yes ☐ No ☐

(If yes, go to question 7)

7. Solicitor's branch sort code

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8. Solicitor's account number

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Section B3: Declaration. To be signed by the person applying for any residual payment or death benefit

- I understand that completing this form does not guarantee an entitlement to death benefits, and that eligibility will be calculated upon receipt of the form.
- I understand that the information supplied on this form will be used for the purposes of processing an application for death benefits.
- I am applying for death benefits under the Teachers' Pensions Regulations.
- I have read and understood the enclosed literature.
- The information I have given on this form is true to the best of my knowledge and belief.
- I understand that if the lump sum death grant is paid more than 2 years after the date Teachers' Pensions first became aware of the death, the payment will be subject to [tax](#).
- I have supplied the relevant documentation to accompany my application and recorded these documents in the **Certificate enclosure form**, as appropriate and as a minimum a Death certificate and Marriage/Civil Partnership certificate where appropriate. All certificates are signed certified or original.
- On signing this form, I agree that any overpayment of pension made to the deceased member can be recovered out of any pension and death grant lump sum due.

Signature

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Date (DD/MM/YYYY)

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Print Name

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If you also wish to apply for a pension for any qualifying child beneficiaries, you will need to complete Part C. Refer to the notes section below for child beneficiary qualifying criteria.

Part C: Applying for child beneficiary pensions

Please provide the full birth certificate, showing parent's details for the child(ren). The birth certificate should be signed certified or original.

Section C1: Children

1. Total number of children

Child 1

1. Surname

2. First name

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

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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4. Tick if incapacitated ☐

5. National Insurance number (if child is over 16)

6. Contact address

<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode

7. Home telephone number (inc. STD code)

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

Yes ☐ Then complete questions nine to 14 in this section

No ☐ Then complete questions 15 to 28 in this section

9. Name of UK bank or building society

Child 2

1. Surname

2. First name

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

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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4. Tick if incapacitated ☐

5. National Insurance number (if child is over 16)

6. Contact address

<input type="text"/>
<input type="text"/>
<input type="text"/>

Postcode

7. Home telephone number (inc. STD code)

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

Yes ☐ Then complete questions nine to 14 in this section

No ☐ Then complete questions 15 to 28 in this section

9. Name of UK bank or building society

10. Name of account holder

11. Branch sort code

12. Account number

13. Bank / building society reference number (where applicable)

14. Full postal address of branch

Postcode

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

15. Payee Name

16. Payee Type

☐

Individual

☐

Company

17. Payee country

18. Payee currency

19. Payee preferred currency

20. Payee address

Postcode

10. Name of account holder

11. Branch sort code

12. Account number

13. Bank / building society reference number (where applicable)

14. Full postal address of branch

Postcode

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

15. Payee Name

16. Payee Type

☐

Individual

☐

Company

17. Payee country

18. Payee currency

19. Payee preferred currency

20. Payee address

Postcode

21. Payee BIC or Swift code**22. Full name and address of overseas bank**

Postcode

23. IBAN/Bank and account codes**24. Account Number****25. Account Type**☐Current/
Cheque☐

Savings

26. Bank Code**27. Branch Code****28. Tax and Identification details* (if applicable)****28A. Tax identification number****28B. Tax identification type****28C. Tax identification issue country****21. Payee BIC or Swift code****22. Full name and address of overseas bank**

Postcode

23. IBAN/Bank and account codes**24. Account Number****25. Account Type**☐Current/
Cheque☐

Savings

26. Bank Code**27. Branch Code****28. Tax and Identification details* (if applicable)****28A. Tax identification number****28B. Tax identification type****28C. 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.

Notes: If the child's bank account details are noted, the pension will be paid into their account (see accompanying notes). For all further eligible children please replicate the above information on a separate sheet entitled Child 3, Child 4 and so on.

Section C2: Declaration. To be signed by any children over the age of 18.

- I understand that completing this form does not guarantee an entitlement to the death benefits, and that eligibility will be calculated upon receipt of the form.
- I understand that the information supplied on this form will be used for the purposes of processing an application for the death benefits.
- I am applying for the death benefits under the Teachers’ Pensions Regulations.
- I have read and understood the enclosed literature.
- The information I have given on this form is true to the best of my knowledge and belief.
- I understand that if the death grant is paid more than two years after the date Teachers’ Pensions first became aware of the death, the lump sum will be subject to [tax](#).

Signature

Date (DD/MM/YYYY)

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Notes: Only complete Section C3 if you are not the person named in Sections A2 or B1.
Where there are different guardians for the different children, please replicate the information contained in Section C3 on a separate sheet of paper.

Section C3: About the child(ren)'s guardian(s)

1. Surname

2. First name

3. Tick which child(ren) the above person is guardian to:

- ☐ Child one ☐ Child two
☐ Child three ☐ Child four

4. Address

Postcode

5. Home telephone number (inc. STD code)

6. Personal email address

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

Yes ☐ Then complete questions seven to 12 in this section

No ☐ Then complete questions 13 to 26 in this section

8. Name of UK bank or building society

9. Name of account holder

10. Branch sort code

11. Account number

12. Bank / building society reference number (where applicable)

13. Payee Name

14. Payee Type

☐ Individual ☐ Company

15. Payee country

16. Payee currency

17. Payee preferred currency

18. Payee address

Postcode

19. Payee BIC or Swift code

20. Full name and address of overseas bank

Postcode

21. IBAN/Bank and account codes**22. Account Number****23. Account Type**☐Current/
Cheque☐

Savings

24. Bank Code**25. Branch Code****26. Tax and Identification details* (if applicable)****26A. Tax identification number****26B. Tax identification type****26C. 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 C4: Declaration. To be signed by the child's guardian.

- I understand that completing this form does not guarantee an entitlement to the death benefits, and that eligibility will be calculated upon the receipt of the form.
- I understand that the information supplied on this form will be used for the purposes of processing an application for the death benefits.
- I am applying for the death benefits for my ward under the Teachers' Pensions Regulations.
- I have read and understood the enclosed literature.
- The information I have given on this form is true to the best of my knowledge and belief.
- I understand that if the death grant is paid more than two years after the date Teachers' Pensions first became aware of the death, the lump sum will be subject to [tax](#).

Signature**Date (DD/MM/YYYY)**

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Section C5: Certificate of continuing education/training: To be completed by the parent/guardian.

This section must be completed by the parent/guardian for each child aged 17 and above. For more than one child, please make copy of this section and complete.

1. Name of deceased member

2. Teacher reference number

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3. Name of eligible child

4. Is the eligible child in full-time education or training?

Yes ☐ No ☐

Signature

5. Has the eligible child previously taken a gap year (a break of more than 12 months) in their studies?

Yes ☐ No ☐

6. If the eligible child is attending a full-time vocational training course, are they being paid at a rate that equals or exceeds £3,045.

Yes ☐ No ☐

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

Notes: How to complete the application form

Please read these notes before completing the death benefit application. (Please do not include these notes when you return the form).

Completing this form does not guarantee an entitlement to benefits. Eligibility will be checked upon receipt.

- Parts A and B of this form must be completed in all cases, regardless of whether any benefits are being claimed.
- If you are informing us of a death and applying for a child beneficiary's pension, complete Part C in addition to Parts A and B.

This form should be completed by the person to whom the death grant or residue is to be paid. If solicitors or a personal representative are dealing with the estate or acting on your behalf they may complete the form on your behalf, but you will be required to sign it. You should ensure that your solicitor's details are included on the form. This must be accompanied by a signed certified or original Death certificate, and where appropriate a signed certified or original Marriage or Civil Partnership certificate, and a **Birth certificate for child(ren) that includes full parental details**.

A death grant is payable to the person nominated to receive it by the member. If there is no nominee, it will be paid to the member's spouse, civil partner, qualifying partner or, if there is no such person, it will be paid to the member's personal representative on production of letters of administration and, if the amount payable exceeds £5,000, we will require a grant of probate accompanied by a letter signed by all parties named on the probate.

The Teachers' Pension Scheme cannot process your claim until all the relevant information and documentation is received. The following signed certified copies or original documents, as required, must be forwarded together with this application form.

- Please note that original documents are only required where the deceased member was resident outside the United Kingdom (UK). The original documents will be returned through standard post.
- Where the deceased member was resident in UK, then the signed certified copies of documents are acceptable if they have been witnessed by a professional person of good-standing in your community.

This can include:

- bank or building society official
- councillor
- minister of religion
- dentist
- chartered accountant
- solicitor or notary
- teacher or lecturer

The person should not be:

- related to you
- living at the same address
- in a relationship with you

The witness must write on the copy that it is a "Certified true copy of the original seen by me," sign and date it, print their name under the signature and include their occupation, address and telephone number. Witnessed copies of documents will not be returned unless requested, in which case they will be sent through standard post.

- **Signed certified copy or original of Death certificate:** This is required in all cases. Alternatively, we can also accept a letter from the coroner stating that there was no third-party involvement or any suspicious circumstances.
- **Signed certified copy or original of Marriage certificate:** Where the deceased member has a surviving spouse at the time of death.
- **Signed certified copy or original of Civil Partnership registration certificate:** Where the deceased member had a registered civil partnership at the time of death.
- **Signed certified copy or original of Decree absolute:** Where the deceased member was divorced before their death.
- **Signed certified copy or original of Dissolution certificate:** Where the deceased member's civil partnership had been dissolved at the time of death.
- **Two pieces of evidence as proof of financial interdependency:** Where the deceased member had a nominated partner, proof of examples of financial interdependency can be shown examples such as joint bank accounts, utility bill or a joint mortgage. However, this is not required if there is a Marriage or Civil Partnership certificate.
- **Signed certified copy or original of Child(ren)'s birth certificates** (showing full parental details): Where the deceased member had any eligible children.
- **Signed certified copy or original of Adoption certificate:** Where eligible children were adopted.
- **Certificate of continuing education:** Where eligible children are over 17 years old, under 23 and are in continuous full-time education or training.
- **Grant of Probate/Letters of Administration:** Where the deceased member died before receiving retirement benefits or within five years of retiring, had not made a nomination and was unmarried or not registered as a civil partner and the estate is over £5,000. A Grant of Probate must be accompanied by a letter signed by all parties named in the Probate.
- **Full Power of Attorney (certified):** Where the person signing is not legally entitled to receive family benefits and is signing on behalf of the spouse or civil partner.
- **Proof of Guardianship/Residency Order:** Where the person signing is responsible for the care of any eligible children.

If the deceased member was employed as a teacher at the time of death or left teaching within the last two years, Teachers' Pensions will need to contact the employer to obtain service and salary information up to the date of death. If the deceased member was in receipt of any compensation from their employer for premature retirement, please notify the employer so that they can stop the payments and prevent any overpayment.

The death grant will be paid directly into the bank or building society account(s) that are entered on the form at section B1 or B2 or C1 or C2 as appropriate.

An adult beneficiary's pension will stop upon their death, unless all the pensionable service from which the pension is derived was prior to 1 January 2007, in which case it will stop if the beneficiary remarries or starts cohabitating with a partner. Please inform us promptly if this situation occurs.

A pension may be payable in the event of a member's death, provided the member was married, in a civil partnership, had a qualifying partner who survived them or had nominated a dependent relative or partner and has enough family benefits service to qualify. If a member has not chosen to cover service for family benefits prior to the specified dates, the minimum family benefits qualifying service is:

- **Surviving qualifying partner:** (for unmarried partners or those not in a civil partnership who meet the relevant criteria), – any service on or after 1 January 2007. These members may wish to pay additional contributions to cover service prior to this date.
- **Widow, widower, same sex civil partner, opposite sex civil partner, same sex spouse:** Any service on or after 1 April 1972 if the member was in service when marrying or forming a civil partnership. Any service on or after 6 April 1978 if the marriage or civil partnership happened after leaving pensionable employment. There were different rules for service which counts for family benefits for female teachers who died before 5 December 2005. Survivor pensions of female teachers that ended before 1 September 2019 were paid in accordance with the rules in place at the time.
- **Nominated beneficiary:** Any service on or after 1 April 1972.

Details of dependency must be confirmed prior to the payment of a dependent relative's pension or a nominated partner's pension.

For more information on how the surviving adult pension is calculated, please refer to the [Family Benefits Guide](#) on our website.

Children

A child's pension may be payable provided the child is unmarried. A pension is payable up to the age of 17. It may continue after the age of 17, provided the child remains unmarried and one of the following conditions are met:

- The child is over the age of 17 and continuing in full-time education without a break of more than 1 year, or
- The child is over the age of 17 and continuing in a full-time training course which runs for a period of at least two years for a trade or a profession, where the annual rate of pay relating to the training course does not exceed a certain level from 1st of April. For the latest factors please see our website at <https://www.teacherspensions.co.uk/members/resources/factors>, or
- A child's pension can also continue if the child is incapable of earning a livelihood due to physical or mental impairment and, because of this impairment, the child was dependent on the member at the date of member's death. In addition to this the child is not wholly maintained out of money provided by Parliament or raised by council tax levied by local authorities. Please provide a letter from a doctor to confirm any impairment, and details of any benefits received from the state and/or other financial support.

*Any child's pension that commenced on or after the 6th of April 2006 (where the pensioner/teacher died on or after that date or was in receipt of a pension on or after that date) will only be payable up to the child's 23rd birthday.

All service from 1 April 1972 automatically counts for children's pensions. Additionally, any service a member has elected to cover for family benefits prior to 1 April 1972 will also be included in the calculation.

For more information on how a child's pension is calculated, please refer to the [Family Benefits Guide](#) on our website.

Children include:

- those born during the member's lifetime or within 12 months of the date of death. You must include any children born to a previous partner.
- adopted children; and
- unadopted children who lived as part of the member's family at the date of death and were financially dependent on the deceased member.
- An eligible child must be:
 - unmarried or not registered as a civil partner; and
 - under age 17; or
 - under age 23 and since attaining age 17 in continuous fulltime education or training lasting at least 2 years for a trade or profession without a break of more than one academic year; or
 - Incapacitated at the time of member's death and unable to earn a living due to ill health (Please provide a letter from a doctor to confirm and details of any benefits received from the state).

There are circumstances when a child's pension may exceptionally be paid after age 23. Please contact TP for further information. A child is to be treated as not attending a course of training when receiving disqualifying remuneration.

- If a child is over age 17, under 23 and since age 17 has been in full-time education without a break of more than one academic year or is undergoing full-time training please also complete the certificate of continuing education, enclosed in the pack. Photocopied forms are acceptable.
- If a child is under age 18 the long-term pension will be paid to their surviving parent or legal guardian.
- If a child is age 18 or over their pension will be paid directly to them.

Please give details of the guardian(s) of the child(ren) and provide proof of guardianship, for example Court of Protection Order.

If a member dies after payment of retirement benefits a Supplementary Death Grant (SDG) may be payable. An SDG will be paid if the amount of pension already paid to the member is less than five times the annual rate of pension in payment at the time of the member's death. In such a case an SDG would be paid to make up the difference.

Overpayment of member's pension: A member's pension is paid up to and including the date of death. Any pension paid after this date will result in an overpayment. This amount is recoverable, and any arrears of the family pension can be used to reduce or clear the overpayment.

The abolition of the Lifetime Allowance (LTA), and the introduction of the Lump Sum Allowances (LSA), the Lump Sum and Death Benefit Allowance (LSDBA) and the Overseas Transfer Allowance (OTA) - The LTA was abolished effectively from 6 April 2024 and replaced by three new allowances. The details of these allowances can be found on the HMRC website (www.hmrc.gov.uk). Where member have taken benefits previously, the value of those benefits will be considered to ensure that member do not exceed their LSA and LSDBA. If there are any other benefits for the member from the TPS or other schemes, details of pensions and lump sums already taken will need to be provided.

Lump Sum Allowance (LSA) and Lump Sum & Death Benefit Allowance (LSDBA): Applies to 'Deferred Choice' members under the Transitional Protection remedy and those not affected by the remedy where the crystallisation takes place on or after 6 April 2024.

Lifetime Allowance (LTA): Applies to 'Immediate Choice' members under the Transitional Protection remedy where the original crystallisation took place prior to 6 April 2024. This is because we are revisiting a previous crystallisation event under the Lifetime Allowance regime which applied and including 5 April 2024.

Authorised payments subjected to tax: If the lump sum Death Grant is paid more than two years after the date Teachers' Pensions first became aware of the death, the payment will be subject to tax. It is, therefore, important that TP are provided with all the information required as soon as possible after the death.

Grant of Probate and / or Letters of Administration: It is necessary for Teachers' Pensions to inspect a sealed copy of Probate of Will or Letters of Administration for example, a copy bearing the impressed seal of the court if the benefits payable exceed £5,000 and there is no surviving nominee, spouse or civil partner. If sending a Grant of Probate, it must be accompanied by a letter signed by all parties named on the Probate.

Where it is intended to apply for Grant of Probate or Letters of Administration, payment will be made to the executor or administrator named in the Grant. Grant of Probate or Letters of Administration can be obtained in the following ways:

- **In England and Wales**, you can apply personally or through a solicitor. Personal applicants may obtain the necessary forms by telephoning the Probate Office on 0845 3020900. You may also obtain these forms from your nearest District Probate office.
- **In Scotland**, confirmation of Executor or Grant of Probate can be obtained from the Sheriff Court of the County in which deceased lived up to the date of death.
- **In Northern Ireland**, you can apply personally or through a solicitor to obtain a Northern Ireland Grant of Probate. Personal applicants may apply to:
The Master, Probate Office, Royal Courts of Justice, Chichester Street, Belfast BT1 3JF.
- **In Eire**, payment will be made on a local grant where there are no assets which make it necessary to obtain an English Grant.
- **Overseas**, a non-UK grant or a completed overseas declaration witnessed by any person competent to administer oaths under the law of the relevant country will be sufficient.

Certificate Enclosure Form

I can confirm that I have enclosed the following certificates:

Death Certificate

☐

Marriage Certificate

☐

Children's Birth Certificates

☐

Adoption Certificate

☐

Grant of Probate

☐

Certificate of continuing education

☐

Decree absolute

☐

Certified Power of Attorney

☐

Civil Registration Certificate

☐

Dissolution Certificate

☐

Proof of financial interdependency

☐

Signed

Date

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

Information: If the deceased member had taken retirement benefits or a lump sum from another pension provider or was intending to claim a pension or lump sums from another provider, you must complete this form. This allows Teachers' Pensions to establish how much of their Lump Sum and Death Benefit Allowance (LSDBA) has been used and what remains.

Notes:

- You should read the accompanying notes for guidance before completing this form.
- You should complete the form in full and return it to the Teachers' Pension Scheme by post at Teachers' Pensions, Unit 5, The Beehive, Lingfield Point, Darlington, DL1 1RW.

Part A: Deceased member details. To be completed in all cases.

Section 1: About the deceased member

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. Last date of teaching employment (DD/MM/YYYY)

(Only complete if the member died in pensionable teaching employment)

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Section 2A: Details of previous pension benefits taken prior to 6 April 2006

If applicable, please provide details below of any other pensions which commenced prior to 6 April 2006.

1. Scheme Name

2. Current rate of annual pension before the deduction of tax

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Section 2B: Details of previous pension benefits taken between 6 April 2006 and 5 April 2024

If applicable, please provide details of any lump sums that came into payment on or after 6 April 2024 or are due to come into payment on or around the same date of retirement as the Teachers’ Pension Scheme.

To convert any pensions in payment after 5 April 2006 into a percentage of the LTA, use the following formula:
$$\frac{(\text{Annual Pension} \times 20) + (\text{Lump Sum})}{\text{Lifetime allowance (See note 1)}} \times 100 = \text{LTA\%}$$

Scheme name	Date benefit was taken	LTA%	Amount of tax free cash received	Total amount of benefit crystallised at the date benefit taken

Section 2C: Details of lump sums paid or due to be paid on or after 6 April 2024

If applicable, please provide details of any lump sums that came into payment on or after 6 April 2024 or are due to come into payment on the same date of retirement as the Teachers’ Pension Scheme. Please indicate the order in which scheme benefits are deemed to come into payment, including the Teachers’ Pension Scheme benefits.

The type of lump sum relevant to this form: Pension Commencement Lump Sum (PCLS), Un-crystallised Funds Pensions Lump Sums (UFPLS), Serious ill Health Lump Sums (SIHLS).

If cash is protected under primary protection amount of cash received

Scheme name	Amount of lump sum allowance (LSA) and lump sum and death benefit allowance (LSDBA) used up	Date paid	£(Total lump sum received*)	Type of lump sum paid (PCLS, UFPLS, or SIHLS)

*If a lump sum has not yet been paid, please enter the expected date of payment.

Section 3: Lifetime Allowance protection certificates

If the deceased member held a valid protection, you need to provide a copy of the certificate(s) or Protection Reference number(s) and ensure you provide their Scheme Administrator Reference Number associated with the protection.

1. Did the deceased member have a valid Primary, Enhanced, Individual or Fixed Protection Certificate? Please tick as appropriate.

Yes ☐ No ☐

By ticking yes, you are confirming that the deceased member's protection remains valid, and no action has been taken that would cause their protection to be revoked.

2. Did the deceased member have an addition to their standard Lifetime Allowance on account of:

☐ Divorce pension credit

☐ Overseas service

Enhancement factors increased their Lifetime Allowance prior to 6 April 2024, and from 6 April 2024 they increase their LSDBA.

Section 4: Transitional Tax-Free Amount certificate

1. Did the deceased member have a Transitional Tax-Free Amount certificate issued from another pension provider? Please tick as appropriate.

If yes, please attach a copy of the certificate(s) to this form.

Yes ☐ No ☐

Part B: Your details. To be completed in all cases

Section 1: To be completed in all cases.

1. Surname

2. Former surname (if any)

3. First name

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

Mr ☐ Mrs ☐ Miss ☐

Ms ☐ Other

5. Relationship with the deceased member

6. Contact address

Postcode

7. Home telephone number (inc. STD code)

8. Mobile telephone number

9. Email address

Section 5: Declaration

I confirm that the information I have given in this form is correct to the best of my knowledge and belief. If I become aware of any alteration to the information given on this form, I agree to notify the Teachers’ Pension Scheme at the earliest opportunity.

Signature

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

Notes for guidance

Please read these notes before completing the Lump Sum and Death Benefit Allowance (LSDBA) assessment form. (Please do not include these notes when you return the form).

1. The Lifetime Allowance

The Lifetime Allowance (LTA) was abolished with effect from 6 April 2024, and replaced by three new allowances. The LTA was introduced by the Finance Act 2004 and was a limit on the amount of pension benefit that could be taken (crystallised) from pension schemes - whether lump sums or a retirement income - and could be paid without trigger an extra charge. Pensions payable from the State or received because an individual was a dependent (e.g. a surviving spouse pension) did not count towards the LTA. The LTA limits can be found here: <http://www.teacherspensions.co.uk/updates>

2. Lifetime Allowance protections

With each change to the LTA, HMRC provided for individuals, who found themselves close to or above the new LTA, the opportunity to apply for "protection". Individuals were also able to apply for an increase to the standard LTA if they had benefits relating to overseas service or a pension credit resulting from divorce.

If an individual had LTA protection or an uplifted LTA, this 'personal LTA' should have been used in the calculation rather than the standard LTA. At retirement, if their benefits exceeded their LTA, the amount by which they had exceeded will have been taxed at 25% and their pension benefits would have been reduced accordingly to pay this charge.

3. Lump Sum Allowance and Lump Sum and Death Benefits Allowance

The Finance Act 2024, which amends the Finance Act 2004, abolished the LTA and introduced three new allowances in its place. The new allowances are: Lump Sum Allowance, Lump Sum & Death Benefits Allowance and the Overseas Transfers Allowance. The new allowances are broadly intended to replicate the tax-free allowances which were available to pension scheme members under the previous regime. For instance, the standard Lump Sum Allowance has been set at £268,275, mirroring the maximum tax-free Pension Commencement Lump Sum a member could receive previously. The Lump Sum and Death Benefit Allowance and the Overseas Transfer Allowance operate separately from one another but are both set at £1,073,100.

4. Transitional Tax-Free Amount Certificate

On account of the introduction of the Lump Sum Allowance, members who crystallised benefits before 6 April 2024 and had not taken the maximum 25% tax free lump sum could apply for a Transitional Tax-Free Amount Certificate. Where a Transitional Tax-Free Amount Certificate has not been awarded, the standard transitional calculation would be applicable and presumes a 25% tax free lump sum was taken. If you believe that a Transitional Tax-Free Amount is applicable in respect of the Lump Sum and Death Benefit Allowance, and the member did not have a relevant crystallisation event on or after 6 April 2024, you can apply for a Transitional Tax-Free Amount Certificate from the administrator of any of the schemes of which the deceased was a member.

5. Benefits already taken

Any benefits previously taken are accounted for when calculating the available Lump Sum and Death Benefit Allowance, including those taken before the Lump Sum and Death Benefit Allowance was introduced.