

Request to transfer pension benefits



Where possible please complete this form through My Pension Online

The easiest way to submit the transfer out application is by logging on to My Pension Online and navigating to Member Portal > My Requests > Manage Request > Transfer Out.

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.

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. First name

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

Mr ☐ Mrs ☐ Miss ☐

Ms ☐ Other ☐

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

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6. National Insurance number

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7. Contact address

Postcode

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8. Home telephone number (inc. STD code)

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9. Mobile telephone number

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10. Email address

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11. I am interested in (please tick)

☐ A transfer to another registered Defined Benefits scheme

☐ A transfer to a scheme offering flexible access to benefits (Defined Contributions). Please note this is only available if you have more than 3 months service but have not qualified for pension benefits in the Teachers' Pension Scheme

12. Name and address of new scheme or Independent Financial Advisor

Postcode

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13. Date started in new scheme (If a date isn't provided your transfer value will be calculated on a non-club basis)

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14. If you have entered into an Additional Voluntary Contributions arrangement with the Prudential or any other insurance company or financial institution, please provide the name and address of the organisation

Postcode

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Section 2: Declaration

I confirm that I wish to apply to transfer my accrued benefits from the Teachers' Pension Scheme. I hereby declare that the information given on this form is true to the best of my knowledge and belief.

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 these notes before completing this application.

How to Complete the Application Form

Notes for the applicant

Part A: General

This form should only be completed if you're thinking of transferring your pension benefits to a Defined Benefits scheme, or, if you have not qualified for benefits but have more than 3 months service in the Teachers' Pension Scheme, a Defined Contributions scheme. The receiving scheme must be registered with His Majesty's Revenue and Customs (HMRC) or be a Qualified Registered Overseas Pension Scheme (QROPS). From 1 April 2015 transfers out of unfunded public sector schemes such as the Teachers' Pension Scheme can only be to schemes offering Defined Benefits, except in the circumstance outlined above.

Please check with your proposed new scheme if they have a time limit on accepting transfers from other schemes.

What you need to know

- This form should only be completed if you wish Teachers' Pensions to investigate the possibility of transfer to another Pension Provider on your behalf.
- Before you complete Part A, please read the guidance above carefully. Please note that the completion of this form will not commit you in any way.
- Please complete this form using CAPITAL letters.
- Please ensure that you send the original completed form as we are unable to accept copies.

Part A:

Teacher Reference Number: This is a seven-digit number and is your unique teacher reference (you may also know it as your DfE number).