

Request to Transfer Pension Benefits

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)

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12. **Applicant's address**

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

3. **First name**

Postcode

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

Mr Mrs Miss Ms Other

13. **Name and address of new scheme or Independent Financial Advisor**

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

6. **National Insurance number**

Postcode

7. **Contact address**

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

Postcode

15. **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**

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

9. **Mobile telephone number**

Postcode

10. **Personal email address**

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

(continued overleaf)

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

Now please sign and date the form

Signature

Date

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 return to us at:

Teachers' Pensions,
11b Lingfield Point,
Darlington, DL1 1AX

www.teacherspensions.co.uk

Part B: To be completed by the former employer of the person named in Part A.

Notes: The details shown below can be submitted via the Secure Transfer Utility (STU)

Teacher's reference number (example 99/99999)

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Section 1

Please show service and salary details (in accordance with the instructions for submitting details of the Monthly Service Return (MDC or MCR) for the last two years' pensionable or 'excluded' employment.

Please include details for the previous Scheme year (01 April - 05 April, 06 April - 31 March) and the current year, up to the last day of pensionable employment.

Note: For annual allowance calculations Teachers' Pensions need to know the pensionable earnings in each tax year, hence the requirement to provide service and pensionable earnings details for 01 April - 05 April separately.

Please DO NOT submit lines with a start and end date spanning 31 March; this will result in delays in processing the application.

When splitting the service year (e.g 01 April - 05 April, 06 April - 30 April), please ensure that the actual part-time salary paid is the pensionable earnings in the period, not the annual part-time earnings.

Please use the example table below as a reference to complete the table overleaf.

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)
FT	123	4567	01/04/19	05/04/19	1/1	27,000					
FT	123	4567	06/04/19	30/04/19	1/1	27,000					W
PTR	123	4567	01/05/19	31/05/19	2/1	25,000	1,000				
PTR	123	4567	01/06/19	30/06/19	2/1	25,000		30		50	W
PTIC	123	4567	01/07/19	31/07/19	3/1	25,000	500		100		

Full-time/Part-time Indicator - Full-time (FT), Part-time Regular (PTR) and Part-time Irregular (PTIC)

Start date and End date - both dates should be in the same calendar month

Role Identifier - this should be provided by MCR employers only and contain a forward slash separating the contract from the role (for example 1/1)

Part-time Earnings - should be the actual part-time earnings for the period stated in the service line

Days Excluded - should only be provided if the member has not worked in the period stated

Additional Pensionable Payments - include Bonus and Out of School Learning Activity (OSLA) payment

Overtime - paid in the service period stated

Withdrawn - a 'W' should be provided where the member has left the Role Identifier contract provided.

Part B: To be completed by the former employer of the person named in Part A. (Continued)

Full time/ Part time Indicator (FT, PT, PTIC)	LA No.	Estab. No.	Start date (dd/mm/yy)	End date (dd/mm/yy)	Role Identifier	Full-time annual salary rate (£)	Part-time earnings (£)	Days excluded	Additional Pensionable payments (£)	Overtime (Gross Amount in £'s)	Withdrawal Indicator (W)

Part B: To be completed by the former employer of the person named in Part A. (Continued)

Section 2: Employer's declaration. To be completed in all cases. I certify that the details in Part B are correct.

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|---|--|
| 1. Signature of authorised officer | 4. Telephone number (inc. STD code and extn.) |
| 2. Name of authorised officer (in capital letters) | 5. Email address |
| 3. Date (DD/MM/YYYY) | |

Please read the accompanying notes before completing this form.

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 Her 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.
- After completing part A:
 - **If you ceased pensionable employment within the last two years**, please forward this form to your last employer
 - **If you ceased pensionable employment more than two years ago**, please return the form to Teachers' Pensions, 11b Lingfield Point, Darlington, DL1 1AX
- Please complete this form using CAPITAL letters
- Only original copies of this document will be accepted.

Part A

To be completed by the applicant in all cases

Part A: section A1

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

Date of Birth: If verification of date of birth is required, we will contact you on receipt of your application

You must sign and date the form for the application to be accepted.

Part B

To be completed by the former employer of the person named in Part A.

Part B: section 1

Please show service and salary details (in accordance with the instructions for submitting details of the Annual Return) for the last two years' pensionable, or 'excluded' employment.

Part B: section 2

You must sign and date the form for the application to be accepted.

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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