

## NHS Pensions – request for an estimated benefit statement

We aim to provide an estimated benefit statement within 40 working days from the date we receive all the information we need.

You will need to complete Part 1 to Part 4 of the form. Your completed form can be emailed to [pensionscanquery@nhsbsa.nhs.uk](mailto:pensionscanquery@nhsbsa.nhs.uk). as the form contains personal information, sending it by email is done so at your own risk. The form can also be posted to the address below:

NHS Pensions  
PO Box 2269  
Bolton  
BL6 9JS

### Part 1 – Partial Retirement Estimate Options

Important note: NHS Pensions cannot normally project Practitioner benefits to future dates as we do not know upcoming dynamising and revaluation factors provided to us by H M Treasury on an annual basis.

**Please read the partial retirement factsheet before completing this section. Partial retirement is applied to the member’s pension benefits in the order they were earned. For example, if you have pension benefits in the 1995 Section and the 2015 Scheme, any percentage you take is applied to the 1995 Section first and the remainder to the 2015 Scheme.**

1. Do you require an estimate for only pension benefits based on membership in your legacy scheme (1995/2008 Scheme) up to 31 March 2015?

Yes  No  Please continue below.

2. If you would like an estimate for 100% of your pension from an individual Section or Scheme, please tick the relevant box(s) below:

1995 Section  2008 Section  2015 Scheme

Or

3. Please indicate the overall percentage of pension benefits you would like an estimate for across all schemes:

1995 Section  % 2008 Section  % 2015 Scheme  %

**Note: If you have pension benefits in two schemes, for example the 1995 Section and 2015 Scheme or 2008 Section and 2015 Scheme you may choose 100% of your 1995 or 2008 Section benefits and some or all of your 2015 Scheme benefits. However, you cannot claim just your 2015 Scheme pension.** You must exhaust pension benefits from each Section before taking a percentage from the next. Any decoupled benefits are excluded from partial retirement.

4. If you have added benefits in the Section or Scheme you are considering claiming retirement from, do you wish to claim them at the same time?

Yes  No

Selected payable date   /   /

## Part 2 – Member’s personal details

Surname

Other names

Address

Telephone number

Email address

National Insurance no.

Membership number (if known) SD   /

If you are acting on behalf of the Scheme member, their written authority to release information to you is required. If this has not already been provided to us, NHS Pensions, please arrange for authorisation to be sent with this form. Please provide your details below and also your relationship to the member (such as, solicitor, client, parent, child).

Your name or company name

Relationship to the member

Your address

Telephone number

Email address

Any information provided will be sent to the requestor's address.

### Part 3 - Declaration

Signature

Name (please print)

Date

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### How we use your information

The NHS Business Services Authority – NHS Pensions will use the information provided for administering your NHS Pension Scheme membership and processing payment of your NHS pension benefits. We may share your information to administer and pay your NHS pension, enable us to prevent and detect fraud and mistakes, for debt collection purposes, or as required by law. For more information about who we share your information with and how long we keep your personal data and your rights, please visit our website at

[www.nhsbsa.nhs.uk/yourinformation](http://www.nhsbsa.nhs.uk/yourinformation)