

Part 2 - Pensionable pay details

For all Schemes, if there are any disallowed days due to unpaid sick leave, email polia3@nhsbsa.nhs.uk with the subject title 'Award Pending' providing the dates of the unpaid sick leave and the dates of any payments in lieu of notice or untaken annual leave made after the unpaid sick leave.

If the member is in the 1995/2008 Scheme, and has 'pay protection' within the last 12 months, complete the details on form AW8 Annex (available on our website) and email it to polia3@nhsbsa.nhs.uk with the subject title 'Award Pending'.

Part 3 - Verification of dates and details given by member in Part 7

In all circumstances original certificates or certified copies must be seen. Enter Y (Yes) or N (No)

- 3.1 Has the member's date of birth at Part 3.2 been verified by sight of the birth certificate? If the birth certificate is not available, another official document such as a passport, can be used for verification. Failure to verify may delay you receiving your benefits.
- 3.2 Have details of marriage given in Part 10.1 been verified by sight of the marriage certificate?
- 3.3 Have details of a registered civil partnership in Part 10.1 been verified by sight of the civil partnership certificate?
- 3.4 Has the spouse or civil partner's date of birth given in Part 10.1 been verified by sight of the birth certificate or another official document?
- 3.5 Has any date given in Part 10.1 been verified by sight of the relevant official document, e.g. death certificate, decree absolute or a civil partnership dissolution order?
- 3.6 Have any children's dates of birth given in Part 10.2 been verified by sight of the birth certificates or passport?
- 4.7 On Pensions Online cases you must complete the table with details from the Enhanced, Primary or Fixed Protection certificate. For all cases you must make a copy of the Protection certificate and send it to NHS Pensions. For cases not submitted via Pensions Online the copy must be attached to the AW8.

Part 4 - Compensation retirement cases only (03 exit code only)

Redundancy Supplementary Checklist complete and forwarded to NHS Pensions Yes No

4.1 Classification (Tick the appropriate box).

- | | | | | | |
|--------------------------------|--------------------------|----------------------|--------------------------|---------------|--------------------------|
| (a) Admin and clerical | <input type="checkbox"/> | (b) Ambulance Person | <input type="checkbox"/> | (c) Ancillary | <input type="checkbox"/> |
| (d) Medical and Dental | <input type="checkbox"/> | (e) Nurse or midwife | <input type="checkbox"/> | | |
| (f) Professional and Technical | <input type="checkbox"/> | (g) Other | <input type="checkbox"/> | | |

4.2 Reason for retirement (Tick the appropriate box. If two or more reasons apply, tick the highest).

- | | | | |
|---|--|---|--------------------------|
| (a) Competitive tendering | Premature retirement | 1 | <input type="checkbox"/> |
| | Redundancy | 2 | <input type="checkbox"/> |
| (b) Organisational change | Premature retirement (Commissioning a patient led NHS) | 3 | <input type="checkbox"/> |
| | Premature retirement (Other) | 4 | <input type="checkbox"/> |
| | Redundancy (Commissioning a patient led NHS) | 5 | <input type="checkbox"/> |
| (c) Other closures | Redundancy | 6 | <input type="checkbox"/> |
| (d) Other redundancies (include those from Organisational change) | | 7 | <input type="checkbox"/> |
| (e) Early retirement in the interest of the efficiency of the service | | 8 | <input type="checkbox"/> |

4.3 Redundancy payments by Employing Authority (EA)

EA responsible for any compensation charges

EA code

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Concurrent Pensionable Employments:

Have you received a completed form AW343 from the member?

Yes

No

Part 5 - Certification

Check:

5.1 Ill Health Retirement: Have you received confirmation of acceptance for ill health retirement from NHS Pensions medical advisers? **Do not** send/submit this form until you have.

5.1a Commuted Ill Health: Has form AW341 or AW341a been received and signed by the member?

Yes No obtain and forward separately

5.2 Compensation Retirement (redundancy):

I certify that:

- (1) The details given in Parts 1 to 5 are correct and the amounts shown in Part 2 have been reconciled with the pension contributions submitted to NHS Pensions
- (2) All Scheme contributions have been, or will be, deducted from the member's pensionable pay
- (3) Form SD55T has been completed on Pensions Online or the leavers excel spreadsheet has been sent to NHS Pensions
- (4) If the box at Part 5.2 is ticked, entitlement to NHS redundancy benefits is provided for in the member's terms and conditions

Authorised Signatory

Full name

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EA / GP Practice stamp

Now process this form on Pensions Online (POL) or send it to NHS Pensions IMMEDIATELY.

Auditor's Statement. For completion only when required.

I certify that *(subject to my report attached) these pensionable pay details agree with the entries in the books and records of the EA. (*delete as necessary).

Signature of Auditor

Date

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The following parts are to be completed by the Scheme member

To the member:

Before you complete Parts 6 to 14 of this form, you should read:

- the guidance notes at the back of this form
- the Retirement Guide

Remember to return your completed form to your employer at least three months prior to your retirement date to ensure that your benefits are paid on time. If you are a medical practitioner, your employer is PCSE for GP's in England and your LHB for GP's in Wales.

NOTE:

In Part 12 we ask you to provide some of the information you have already written in Part 6. This is because Part 12 may be sent separately to our Pensioner Administration Team for them to make arrangements to pay your benefits on the due date.

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, visit our website at www.nhsbsa.nhs.uk/yourinformation

Part 6 - About yourself

6.1 About yourself. Write in CAPITAL LETTERS using BLACK INK

Title (e.g.Mr, Mrs, Miss, Dr)

Surname

Former surname (If applicable)

Other names

National Insurance number

Address

Post code

Contact telephone number

Email address

6.2 Your date of birth:

Show your birth certificate to your employer. If your birth certificate is not available, show another official document, such as a passport, instead, failure to do so may delay you receiving your benefits.

Part 7 - Employment details

7.1 Your intended retirement date

7.2 Have you any other work in the NHS at the time of retirement from this job?

Yes

No

7.3 Will you be re-employed in the NHS after retirement from either 7.1 or 7.2?

Yes

No

If you ticked YES at 7.2 above, please tell us below about the work you are doing:

Where do you work?

What is your job?

When will this job end?

If you ticked YES at 7.3 above, tell us about the work will be doing:

Where will you be working?

What will your job be?

On what date will the job begin?

More information about re-employment is available on our website at: www.nhsbsa.nhs.uk/nhs-pensions.

Part 8 - Allocating part of your pension

Do you wish to allocate part of your pension?

(This means giving up part of your pension **now** to provide a pension for someone else when you die, **in addition to** any survivor benefits payable from the scheme)

No

Yes Read the Allocation section of our website at: www.nhsbsa.nhs.uk/nhs-pensions.
Complete form AW8/11A and send it to us with this form

Part 9 - Retirement lump sum - refer to the guidance notes for further information

Before you complete this section you should refer to the application guidance notes to ensure you fully understand your options. It may not be possible for you to change your decision once your benefits are already in payment.

9.1 Which Section or Scheme are you claiming your benefits from (tick all that apply)

- 1995 Section (Complete Part 9.2) 2008 Section (Complete Part 9.3)
 2015 Scheme (Complete Part 9.4)

9.2 1995 Section (only complete if you have 1995 Section membership on or after 01 April 2008)

Do you want an additional lump sum by giving up part of your pension? Yes No

If YES do you want: (select one option)

- A. The maximum additional lump sum, which may incur a tax charge, or Yes
B. The maximum tax free amount, or Yes
C. An additional amount chosen by you but less than the maximum permitted: £

(Enter the amount in whole pounds divisible by 12 only and do not include your normal lump sum entitlement).

9.3 2008 Section

Do you wish to give up part of your pension to receive a lump sum? Yes No

This is in addition to your mandatory lump sum equivalent to your entitlement under the 1995 Section for your membership up to 31/03/2008 if you opted to move from the 1995 Section to the 2008 Section.

If YES do you want (select one option):

- A. The maximum lump sum, which may incur a tax charge, or Yes
B. The maximum tax free amount, or Yes
C. An amount less than the maximum amount permitted, of: £

(Enter the amount in whole pounds divisible by 12 only.)

9.4 2015 Scheme

Do you wish to give up part of your pension to receive a lump sum? Yes No

If YES do you want (select one option):

- A. The maximum lump sum, which may incur a tax charge, or Yes
B. The maximum tax free amount, or Yes
C. An amount less than the maximum amount permitted, of: £

(Enter the amount in whole pounds divisible by 12 only.)

9.5 Trivial Commutation and Small Lump Sum

You may be able to commute all your pension benefits to a one off payment if you only have entitlement to a small pension. More information is provided in the guidance notes at the back of this form.

Part 11 - HM Revenue and Customs (HMRC) information

To comply with HMRC legislation you must answer the following questions. It is important that you complete these questions fully and correctly and supply any information asked for. Failure to do so will delay the payment of pension and lump sum and may cause all your benefits to have the Lifetime Allowance Charge (LTAC) applied to them.

11.1 Have you any pension arrangements, this includes money purchase Additional Voluntary Contributions (AVC's), that are separate from your main NHS pension benefits, either in payment or not?

Yes continue No go to question 11.6

11.2 Will your annual pension from all your pension arrangements, including the NHS Pension Scheme, be more than £35,000 per year? Or have you accessed your benefits with another pension scheme using pension flexibilities?

Yes continue Don't know continue No go to question 11.6

11.3 Excluding your main NHS pension benefits were any of your separate pension benefits in payment **on or after 6 April 2006**? This includes any benefits from another pension provider accessed using pension flexibilities.

Yes continue No go to question 11.4

(i) Give us the total combined percentage of Lifetime Allowance (LTA) (to two decimal places i.e. 43.21%) used by all your separate pension benefits in payment on or after 6 April 2006.

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(ii) Date of first Benefit Crystallisation (The date accrued benefits are put into payment from another pension provider after 5 April 2006)

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11.4 Excluding your main NHS pension benefits were any of your separate pension benefits in payment **before 6 April 2006**?

Yes continue No go to question 11.5

(i) Gross annual rate (before deduction of income tax) of pension(s) in payment, from your separate pension arrangements (not your main NHS pension) at the earlier of either today's date or a date at 11.3(ii).

£

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11.5 If you are in receipt of any other benefits and you are unable to provide us with the answers to questions 11.3 and 11.4 we will only be able to process your application if we treat your NHS Pension Scheme benefits as entirely in excess of the LTA. This will mean the Scheme pays 55% of your lump sum and 25% of your pension directly to HMRC, unless you instruct NHS Pensions to defer payment of your benefits until you have gathered the necessary information.

If you would like us to do this, tick this box.

Alternatively wait until you know what percentage of the LTA has been used before returning this form. You may need to contact the Scheme Administrator of your other pension arrangements for this.

11.6. Do you have any valid HMRC LTA protection (e.g. Enhanced, Primary, Fixed (2012, 2014 or 2016), or Individual (2014 or 2016))? **If so you must give the paper certificate(s) or a copy of HMRC's notification confirming the 2016 protection reference number to your pensions office, or your benefits may be delayed.** Your pensions office will send a copy to NHS Pensions.

Yes give details below

Certificate number /reference number

No

Part 12 - Payment details

12.1 About yourself. Write in CAPITAL LETTERS using BLACK INK

Title (e.g. Mr, Mrs, Miss, Dr)

Surname

Former surname (If applicable)

Other names

National Insurance number

Date of birth

Address

Post code

Contact telephone number

Email address

12.2 Bank/Building Society account details:

We cannot process the case without this information and all details must be provided in order to avoid delays

Name(s) of account holder (This must be either your name as stated on your account, or the names stated on the joint account you hold with someone else)

Branch sort code

Account number to be credited

and/or Building Society Roll No.

Type of account

Current account - enter 0

Deposit account - enter 1

If your bank is outside the UK, indicate which country your pension will be paid to:

You will need to complete the mandate for the payment to be made to an overseas bank and attach it to this form (see guidance notes).

Part 13 - Voluntary deductions

Read the Retirement Guide and the list of code numbers.

If you want deductions to certain organisations to be made from your pension give details below.

Code No.	Organisation	Deductions		Health Scheme Membership or Policy No.
		Monthly	Weekly	

I wish the above deductions to be made from my pension. I understand that if the organisations vary the amounts I have to pay, then the deductions from my pension will vary as well.

- I understand that NHS Pensions will be required to disclose the information I have supplied to British Healthcare Association (BHCA) (Services) Ltd.
- I understand that if I do not provide my policy number NHS Pensions will have to disclose my date of birth and address to British Healthcare Association (BHCA) (Services) Ltd. It may also be necessary for NHS Pensions to notify British Healthcare Association (BHCA) (Services) Ltd of any future change of address.

This personal information will be used by British Healthcare Association (BHCA) (Services) Ltd to ensure that the money deducted from your pension is paid to the correct organisation to keep your cover up to date. It will not be used for any other purpose.

Signature

Date

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Part 14 - Declaration

Sign and date this in the presence of a witness. The notes below explain who can witness.

I DECLARE that:

- I have read the Retirement Guide for members of the NHS Pension Scheme and the application guidance notes attached to this form
- The information I have given is correct and complete to the best of my knowledge and belief. If I become aware of any change in the information given on this form, or any further new information relevant to the form, I agree to notify NHS Pensions at the earliest possible opportunity
- I will notify NHS Pensions if I recycle my NHS Pension Commencement Lump Sum
- I understand that I will have to repay any overpayment of pension if necessary
- If I have Enhanced, Primary or Fixed protection 2012 or 2014, or Individual Protection 2014 certificate from HMRC I have enclosed a copy of the certificate
- If I have Fixed or Individual Protection 2016, I have enclosed a copy of HMRC's notification confirming the reference and/or certificate number
- If I have Fixed Protection 2012, 2014 or 2016 I declare I have checked for Benefit Accrual (Note 2 on the Certificate for Fixed Protection refers) and have not had Benefit Accrual up to and including the date of my retirement
- I am entitled to and apply for my retirement benefits from the NHS Pension Scheme

Applicant's usual signature

Date

			/				/				
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Ask your witness to sign and complete the section below.

Witness: The spouse or civil partner of an applicant may **not** witness.

Persons who may witness - A person who is registered to vote in the United Kingdom may witness in any part of the world.

Outside of the United Kingdom, the Declaration may also be witnessed by one of the following persons. They should state their qualification in the witness space below:

Persons who may witness outside the UK

- A registered UK voter
- A listed or retired officer of the armed forces
- A permanent or retired civil servant of any country in the Commonwealth or Ireland
- A member of the diplomatic service
- An authorised bank official
- A doctor or surgeon registered where the Declaration is made
- A minister of religion
- A merchant ship master who is a British subject
- A Commonwealth or Irish university graduate
- A magistrate
- A barrister, solicitor or advocate authorised to practice where this Declaration is made
- A Notary Public or other person qualified to administer oaths where this Declaration is made
- A registered voter in the Crown dependencies of Jersey, Guernsey and the Isle of Man
- In the Channel Isles:** A Channel Isle elector
- In the Isle of Man:** An Isle of Man elector

I CERTIFY that the above Declaration was signed IN MY PRESENCE by the applicant, whom I believe to be the person named.

Witness signature

Print your full name

Date

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Address

Post code

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If you are registered in the United Kingdom as a parliamentary elector, tick this box:

If you are witnessing outside the United Kingdom and you are **not** a U.K. parliamentary elector, please write your qualification, from the list above, in this box.

NHS Pensions Retirement benefits claim form (AW8)

- Guidance notes for applicants

General

Before you complete the claim form you may need to read or download further information from our website at: www.nhsbsa.nhs.uk/nhs-pensions.

Part 6 About yourself

6.1 and 6.2

Enter details about yourself including your contact telephone number and email address, if you have one. You must show your original birth certificate or an original certified copy of it to your employer. If you do not have an original birth certificate you may show them your original passport.

Part 7 Employment details

If you are claiming benefits from the 1995 Section you normally have to have stopped working in the NHS for at least 24 hours before you can become entitled to receive them. If you are claiming benefits from the 1995 Section, 2008 Section or 2015 Scheme you must have a 24 hour break from all NHS employment before pension benefits can be claimed, regardless of the amount of hours worked. An exception is where you are drawing down some of your 1995/2015 or 2008/2015 benefits. In these cases it is not necessary to have stopped working in the NHS for at least 24 hours before becoming entitled to receive your 1995 Section, 2008 Section or 2015 Scheme benefits.

In the 2008 Section and 2015 Scheme you must have a 24 hour break from all NHS employment before pension benefits can be claimed, regardless of the amount of hours worked.

7.1

In this part of the form we ask for details of your previous/current NHS employer. We also ask for future employer details if you intend to work (or continue to work) in the NHS after you get your pension in case it is subject to suspension or abatement.

7.2 and 7.3

The term 'NHS employer' means an employer who has access to the NHS Pensions Scheme, which may include organisations delivering services to the NHS. Check with your new employer first. If you tick yes to both 7.2 and 7.3 complete both sections providing the relevant details about your job.

Note - If you have been part of a TUPE or a Bulk Transfer to the NHS (including a broadly comparably pension scheme) provide details in writing.

Part 8 - Allocating part of your pension

Allocating part of your pension

Allocation is giving up a part of your pension to provide a pension for somebody else when you die, for example a member of your family or a close friend (your beneficiary). This means your pension will be reduced at your retirement. If you die before your beneficiary they will then get that part of your pension you have allocated to them for life. You can allocate to anyone you choose as long as they are at least partially dependent on you. If you allocate to your spouse, civil partner or nominated qualifying partner they will get the allocated pension as well as their survivor's pension from the Scheme. It is important to note that the pension you give up does not count against the standard Lifetime Allowance.

An application to allocate must be made with this form by completing form AW8/11A which is available on our website at: www.nhsbsa.nhs.uk/nhs-pensions. The form must be attached to this application form and once your benefits have been put into payment an application to allocate cannot be accepted. You cannot cancel the allocation and keep the pension at a later date, even if the beneficiary dies before you.

Part 9 Type of pension and retirement lump sum

9.1

In this part of the form we ask you to indicate the Section(s) or Scheme you are claiming from by ticking the appropriate box(es). Tick all boxes that apply and follow the instructions to complete the relevant remaining

questions about pension commutation. If you are unsure which Section of the Scheme you are claiming your benefits from refer to the Member ID tool available on our website at: www.nhsbsa.nhs.uk/nhs-pensions or ask your employer.

Our website includes a pension commutation factsheet which must be read for full details. You can also find a calculator tool to help you model the amount of additional lump sum you can claim. The maximum amount of lump sum is provided on your Total Reward Statement (TRS).

Claiming a bigger lump sum does not affect the level of adult dependant's pension or children's pension payable.

Claiming a bigger lump sum at retirement may affect entitlement to any lump sum on death that may be payable when you die, even if you die within a short time of your retirement date.

9.2 1995 Section

If your Scheme membership extends beyond 31 March 2008, you have the option to increase your lump sum by converting some of your pension. The maximum additional lump sum allowed under HM Revenue and Customs rules is approximately two and a quarter times your annual pension (before conversion to additional lump sum). You can claim any amount of additional lump sum up to a total of this maximum. Pension is converted to lump sum at the rate of £12 additional lump sum for every £1 of pension given up.

You must indicate whether or not you want an additional lump sum by ticking the appropriate box. If you want an additional lump sum then select either:

- A. the maximum lump sum, which may incur a tax charge; or
- B. the maximum tax free amount; or
- C. enter an additional lump sum in whole £s in multiples of £12, which if added to your standard lump sum would be less than the permitted maximum lump sum. Do not include your standard lump sum in the amount requested.

9.3 2008 Section

Unless you opted to move your membership from the 1995 Section to the 2008 Section under the "Choice" exercises, there is no basic lump sum entitlement. However, you do have the option of receiving a retirement lump sum by giving up part of your pension. The maximum lump sum allowed under HM Revenue and Customs rules is approximately four and a quarter times your annual pension (before conversion to any lump sum). You have to give up some of your pension to pay for the mandatory lump sum if you transferred membership under "Choice" and for any other lump sum. You will receive £12 of lump sum for every £1 of pension given up.

You must indicate whether or not you want a lump sum (other than the mandatory lump sum, if applicable) by ticking the appropriate box. If you want a lump sum (or additional lump sum) then select either:

- A. the maximum lump sum, which may incur a tax charge; or
- B. the maximum tax free amount; or
- C. enter a lump sum in whole £s in multiples of £12, which together with any 'mandatory lump sum' (if applicable), is less than the permitted maximum lump sum.

9.4 2015 Scheme

There is no basic lump sum entitlement but you do have the option of receiving a retirement lump sum by giving up part of your pension. The maximum lump sum allowed under HM Revenue and Customs rules is approximately four and a quarter times your annual pension (before conversion to lump sum). You will receive £12 of lump sum for every £1 of pension given up.

You must indicate whether or not you want a lump sum by ticking the appropriate box. If you want a lump sum then select either:

- A. the maximum lump sum, which may incur a tax charge; or
- B. the maximum tax free amount; or
- C. enter a lump sum in whole £s in multiples of £12 which, is less than the permitted maximum lump sum.

9.5 Trivial Commutation and Small Lump Sum

For those retiring from both the 1995/2008 and 2015 Schemes, you may be able to commute all your pension benefits to a one off payment if you only have entitlement to a small pension.

Where the capital value of your benefits built up within the NHS Pension Scheme and with any other pension providers is £6,000 or less, we will automatically write to you with an estimate and options form when we process your application. If the capital value of all your pension benefits is more than £6,000 but less than £30,000 (between approximately £300 and £1,500 per year in the 2008 Section and 2015 Scheme and between approximately £260 and £1,300 in the 1995 Section) you may be able to choose to take all your benefits as a one off payment.

There are certain HM Revenue and Customs conditions which must be met in order for pension benefits to be commuted to a one off lump sum payment. A dedicated factsheet is available in the 'Applying for your pension' section of our website. If interested in applying, you must first read this factsheet to check if you are eligible and if so, attach the AW8/TCE application to this form.

Part 10 About your status

10.1

It is important that you tell us your current status and supply details of your spouse or civil partner, if you have one. This information is used in the event of your death and informs us if there are any survivor's benefits payable if you die before your spouse or civil partner. Having these details will speed up the payment of any survivor's benefits due and will also put less strain on your dependents at that time.

We ask you to show various certificates and other papers to your employer. BUT, IF YOU WISH, you can send information about your marital or civil partnership status and family direct to NHS Pensions instead. The address is in the Retirement Guide. If you use this method you should write a covering letter enclosing the certificates etc. Be sure to show your Scheme membership number clearly in your letter. You must enclose original or certified copies of any certificate or document asked for. Photocopies are not acceptable. If you have previously nominated a partner by sending us a completed form PN1, you should refer to the notes on that form. It is not necessary to repeat details of a nominated partner here.

10.2

A children's pension may be payable on your death. The terms 'children's pension' and 'child' can cover a number of other possible dependants as well as your own children – see below for more information.

Where your **Scheme membership extends beyond 31 March 2008** a pension may be paid if the child is dependent on you, both at retirement and on your death, and they are:

- under age 23, or
- aged 23 or over and incapable of earning a living due to permanent physical or mental infirmity which he/she was suffering at the time of your death.

Where your **Scheme membership ended before 1 April 2008** a pension may be paid if the child is dependent on you, both at retirement and on your death, and they are:

- under age 17, or
- aged 17 or over but still in full time education or training and have been so continuously since the age of 17 until they reach a maximum age of 23, or
- aged 23 or over and incapable of earning a living due to permanent physical or mental infirmity which he/she was suffering at the time of your death.

"Child" can include:

- biological children;
- children of your civil partner or nominated qualifying partner;
- step children and adopted children;
- a brother, sister, nephew or niece of you, your spouse, civil partner or nominated qualifying partner;
- a grandchild;
- a half brother, half sister, step brother or step sister of you, your spouse, civil partner or nominated qualifying partner;
- children born before and within 12 months of the date you left the Scheme with deferred benefits.

Enter the details of any qualifying children in the boxes.

Part 11 HM Revenue and Customs (HMRC) Information

To comply with HMRC legislation it is important that you complete these questions correctly. Failure to do so may delay the payment of your pension and lump sum.

11.1

You must answer this question. If you do not have any other pension arrangements outside the NHS Pension Scheme, tick 'No' and go straight to question 11.6. 'Any other pension arrangement' does not include any State Pension benefits you are being paid or any pensions that you are being paid as a survivor or dependant.

11.2

If you have answered 'Yes' to question 11.1 you must also complete this question by ticking the appropriate box. If you answer 'Yes' or 'Don't know', you need to read the Tax information section of our website. If you tick 'No' go straight to question 11.6.

11.3

If you answer 'Yes' complete both questions 11.3(i) and 11.3(ii). If you do not know the percentage of the Lifetime Allowance (LTA) used, or the date your benefits crystallised, your other pension provider(s) will be able to confirm these details for you. The date of the Benefit Crystallisation Event (BCE) cannot be before 6 April 2006. This date is important as it could affect the calculation of the LTA you have used. If you answer 'No' continue to question 11.4.

11.4

If you answer 'Yes', complete question 11.4(i) confirming the total annual pension in payment at the earlier of either the date of the first BCE (see 8.3(i)), or the date you are completing this form. If you answer 'No' go to question 11.5.

11.5

Tick this box if you cannot provide the percentage figure and BCE date, or the amount of pension in payment for a pension that started before 6 April 2006 and you wish your benefits to be paid before you can confirm this information. Your application will be processed by treating your NHS Scheme benefits as entirely in excess of the standard LTA and applying the LTA Charge of 55% to your lump sum and 25% of the capital value of your pension (this is the pension payable multiplied by 20). When the details are known let this office know in writing and the charges will be checked and amended as appropriate. Any over deducted charges will be returned. Continue to question 11.6.

11.6

If you answer 'Yes' you must enclose a copy of your certificate with this application form and confirm the certificate reference number in the box provided. If you have more than one certificate then add the reference number(s) to the form and enclose a copy of each protection certificate.

Part 12 Payment details

Enter the details of the Bank or Building Society where you would like your benefits to be paid. Your benefits will only be paid into a bank or building society account, as this is the safest method of payment. Complete this section fully to ensure NHS Pensions can arrange payment of your benefits.

If your bank account is outside the UK, payments can be made direct, providing it is one of the countries listed in the Retirement Guide and it is capable of receiving secure electronic payments of funds. You will need to complete the mandate for the payment to be made to an overseas bank and attached it to this claim form. This is available from our website at: www.nhsbsa.nhs.uk/nhs-pensions.

Part 13 Voluntary Deductions

Read the Retirement Guide and the list of code numbers.

Part 14 Declaration

You must read the declaration before you sign and date the application form in front of a witness and ask them to certify this by completing their details and also signing the form.

You must read the Retirement Guide and any associated factsheets if you are unclear on any of the points in this section.

Information on the recycling of pension commencement lump sum is available on our website.