

**SCOTTISH TEACHERS' SUPERANNUATION SCHEME
06/2012**

WHO SHOULD READ: All HR staff, Payroll Managers and staff who submit retirement applications to SPPA
ACTION: To read, take action and circulate
SUBJECT: Retirement applications

The purpose of this circular is to:

- advise you of a revised STSS retirement application
- ask that you verify the date of birth

If you do not deal directly with staff who are retiring, I would be grateful if you could redirect this circular to the relevant staff.

It has been necessary to update our retirement applications as they no longer reflect the information required by HMRC such as Taxation, Recycling and for Protection of the Lifetime Allowance. Other areas have been updated to simplify the process such as Lump Sum Choice (Commutation) information and also to the pensionable salary sections, to highlight information required for full time, part-time and supply staff.

With so many changes required, a complete overhaul of the applications was undertaken. This has resulted in an application which now also includes Phased retirement. It is hoped that you and your employees will find this revised STSS: RET combined application easier to complete.

The new application is available from our website and should be used with immediate effect. We understand that you may have members who are already going through the retirement process and have completed an old style application. We will continue to accept these until 30 June 2012, after which we will return to you, all applications made on old style forms.

As with all new applications, invariably they are subject to change. Therefore, we ask that you access our website each time you require an application and do not print off in bulk as they will be updated on a regular basis.

We have also updated the member guidance notes, which we hope will help members when completing their application. The guidance notes also advise members to look at various factsheets prior to completing their retirement applications so that they can make informed decisions on some of the choices they have. The guidance for employers has also been updated and is in the Benefits section of the Employers Guide and we would encourage you to refer to this if you are unsure on how to complete any sections of the application. Please contact us if you note anything that requires amending or if you have any suggested improvements.



We understand that you verify your employees date of birth on employment and, to provide an improved service for our members, we ask that, before an application is submitted, you confirm their Date of Birth and indicate this on their application. This will remove the need for members to send in their birth certificate with the application. However, on the death of a member we will verify and ask for copies of marriage and death certificates as required.

Pam Brown
Director of Operations
30 March 2012

Contact Information:

Should you have any enquiries about this circular, or require further information, please contact: sppastakeholderliaison@scotland.gsi.gov.uk

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