

# Member guidance for completing application form NHS: (RET)

## You should retain these for future reference

These guidance notes are designed to help you complete your application for retirement. You may also find it helpful to read the [Retiring from the NHS](#) section of the SPPA website ([www.pensions.gov.scot](http://www.pensions.gov.scot)) prior to completing this.

Certain sections are only specific to either deferred members (who have left the scheme and have preserved their benefits until normal pension age (NPA)) or to those who are applying for premature or partial retirement.

So that we can pay your benefits on time (if still in NHS employment) you should ensure that you forward the completed application form to your employer **at least four months prior to your retirement date**. This will allow them sufficient time to complete their part of the form and send it to SPPA. If you have preserved benefits, please forward your completed application directly to SPPA. If you supply your email address, we can acknowledge your application by email.

If you are currently employed in the NHS, your employer will confirm your date of birth, from their records. You do **not** need to send a birth certificate with your application.

During the application process, if you call us, you will be given a list of options for who you wish to be transferred to. You should select 'NHS Awards' until your benefits are calculated and 'Payroll' after your pension goes into payment. You should have your superannuation number ready. The checklist attached provides contact details should you need to call us.

Before you retire, we will write to you advising how much your benefits are, when they will be paid and details about taxation. We will not send you a

pension advice note every time a payment is made to you. Your benefits may be subject to revision if your employer sends a change in retirement date, or revised pensionable pay details. Any overpayment that occurs will be recovered from you. In addition, any additional amount payable will be treated as a separate benefit crystallisation event. For further information see the Taxation section on our website.

The application form refers to the 1995, 2008 sections and the 2015 scheme.

- **1995 section** – for members who joined the scheme before 1 April 2008 and did not elect to join the 2008 section through the Choice exercise. The NPA for the 1995 section is age 60 (55 for members who hold special class / MHO status)
- **2008 section** – for members who joined the scheme on, or after, 1 April 2008 and also those who moved as part of the Choice exercise. The NPA for the 2008 section is 65
- **2015 scheme** – for members who joined the scheme on or after 1 April 2015 and also those who had tapered or no protection and moved to the scheme, or moved as part of the Choice 2 exercise. The NPA for 2015 is the same as your state pension age

If you are still working in the NHS, after completing all relevant details in Part 1, you should return your application to your employer for completion of Part 2. They will forward it on to us.

## PART 1. SECTION 1.

### Personal details (to be completed in all cases)

Please complete all fields with the information requested. Your superannuation number will be on any previous correspondence that we have sent you. You should complete the seven digit number only with no prefixes or slashes e.g. 3030300. If, however, you do not know this, please ensure your date of birth and National Insurance number are completed.

**TYPE OF RETIREMENT** – Please select the type of retirement relevant to you.

#### Active members

##### (currently contributing to the scheme)

**Age retirement (AGE)** – you are retiring at or after your Normal Pension Age (NPA)

- **1995 section** – if you were a member of the NHSS(S) prior to 1 April 2008 your NPA is 60
- **2008 section** – if you joined the scheme on or after 1 April 2008 your NPA is 65
- **2015 scheme** – if you joined or moved to the 2015 scheme your NPA will be the same as your State Pension Age

**Voluntary Early Retirement with Actuarial Reduction (VERA)** – you are retiring before your Normal Pension Age

Pension and lump sum benefits are reduced actuarially depending on your age in years and complete months. This reduction is applicable to your pension for the lifetime duration of your pension payments.

- **1995 section** – you can retire on voluntary grounds with a reduction in pension benefits if you are over age 50, or 55 if you joined on or after 6 April 2006
- **2008 section** – you can retire on voluntary grounds with a reduction in pension benefits if you are over age 55
- **2015 Scheme** – you can retire on voluntary grounds with a reduction in pension benefits if you are over age 55

**Premature retirement (PREM)** – you are retiring early and your employer has agreed to pay the cost

Your employer must certify that your employment has come to an end because of redundancy and agree to pay mandatory compensation. Premature retirement does not apply to Practitioner employments.

- **1995 section** – premature retirement benefits may be payable to you if you are aged 50 or over, you were a member prior to 6 April 2006 and your employer agrees that you may be awarded premature retirement. If you joined the scheme on or after 6 April 2006 the minimum age is 55
- **2008 section** – premature retirement benefits may be payable to you if you are aged 55 or over
- **2015 scheme** – premature retirement benefits may be payable to you if you are aged 55 or over

**Partial retirement (PARTIAL)** – you are taking only part of your benefits (2008 and 2015 only)

Partial retirement is taking part of your retirement benefits, whilst reducing your earnings, in the lead up to retirement.

To qualify:

- you must be a member of the 2008 or 2015 section
- have reached the minimum pension age of 55
- elect to receive at least 20% of your benefits in the scheme (a minimum of 20% must remain within the scheme until final retirement)
- reduce your pensionable earnings by 10% of a level sustained for a period of the 12 months prior to the partial retirement election. The reduction in pensionable earnings must remain in place for a period of 12 months following partial retirement

If you have concurrent employments, the 10% reduction in pensionable earnings will apply to your earnings from all NHS pensionable employment.

**Example:** if your total earnings in three part time posts is £20,000, you would have to reduce your total earnings for the next 12 months by  $£20,000/100 \times 10 = £2,000$ .

## Deferred member (you have preserved your benefits in the scheme)

### Age retirement (AGE)

- **1995 section** – deferred members of the 1995 section can normally claim their preserved benefits from age 60 providing they are not in NHS employment in the UK at that time
- **2008 section** – deferred members of the 2008 section can claim their preserved benefits from age 65 providing they are not in NHS employment in the UK at that time
- **2015 scheme** – deferred members of the 2015 scheme can claim their preserved benefits from NPA, which is the same as their State Pension Age

### Voluntary Early Retirement with Actuarial Reduction (VERA)

- **1995 section** – if you ceased contributing to the scheme on or after 31 March 2000, you can claim your preserved benefits early from age 50, or 55 if you joined on or after 6 April 2006
- **2008 section** – you can claim your benefits early from age 55
- **2015 scheme** – you can claim your benefits early from age 55

If you have, or are applying for NHS Injury benefits, you must notify us. If you do not advise us and an overpayment occurs, we will seek recovery in full.

### SECTION 2. Bank or Building Society details

If you have any difficulties completing this section, please contact your bank or building society who will be able to assist you. We will pay your retirement benefits into the account that you request here and you should ensure that all relevant fields are completed accurately. The details required can be found on your bank card or statement and you should ensure that the correct sort code, account number and/or Building Society roll number are entered. If any of these details are wrong this may result in payments being delayed.

Pension payments are made on the last banking day of each month and these are paid directly into

your nominated bank account. Payment is made monthly, in arrears and you will receive 1/12th of the annual amount to the nearest penny. However, the first payment may be a proportion of one month's payment if your pension started part way through the month. If we are in receipt of all the relevant information on time, lump sum payments (if applicable) will normally be paid into your nominated bank account within one month of your date of retirement.

If your bank account is outwith the UK, please indicate the country your bank is based in and you will be issued with the appropriate Transcontinental Automated Payment Service (TAPS) form.

If any of your personal or bank details change, please notify us immediately as a delay may result in late payment of your benefits.

### SECTION 3. Details of spouse/civil partner/surviving partner

All fields within this section should be completed as appropriate to your circumstances. This information will assist in dealing with any benefits payable in the event of your death. Certificates are not required to be presented at this stage but copies will be asked for when death benefits are claimed.

Under the NHS Regulations 1995 (amended), if you are not married or in a civil partnership, benefits may also be payable to a surviving partner. To be eligible, the member must have accrued service post 1 April 2008. The benefits will be paid to the surviving partner, provided that at the date of death the member and partner were:

- living together in an exclusive committed long term relationship of at least 2 years;
- free to marry or enter a civil partnership and;
- financially interdependent

## SECTION 4. Lump sum choice

This means giving up part of your pension in exchange for a tax free lump sum or to increase your lump sum.

All members of the scheme, who were in service on 1 April 2008, have the option to commute part of their pension to increase their tax free lump sum. Members who joined the scheme on or after 1 April 2008 have the option to commute part of their pension to obtain a tax free lump sum. If your benefits were preserved prior to 1 April 2008 the option to increase your tax free lump sum is not available. To increase the tax free lump sum or to obtain a tax free lump sum, there will be a reduction in your annual pension. You will need to give up £1 of annual pension for every £12 received as a lump sum. However, there is a maximum lump sum that can be taken, as allowed by HM Revenue and Customs, of 25% of the fund value. How this is calculated is shown below.

**1995 section** – if you were a member of the scheme before 1 April 2008 and were in service on that date, the formula for calculating the maximum amount of lump sum benefits that can be paid is as follows:

$$\frac{(\text{pension} \times 20) + (\text{lump sum} \times 20/12)}{4.6667}$$

You may choose to take an additional lump sum up to the maximum. Please note that you cannot give up any part of your normal lump sum to increase your pension.

**2008 section or 2015 scheme** – if you joined the scheme on or after 1 April 2008, there is no automatic entitlement to a lump sum. The formula for calculating the maximum amount of lump sum is as follows:

$$\frac{(\text{pension} \times 20)}{4.6667}$$

You may choose to take a lump sum of any amount up to the maximum. If you wish to investigate how commutation of pension would affect your retirement benefits, please use the pension's modeller available on the SPPA website. Please note that the modeller

only calculates 1995 section benefits.

This should only be used for illustrative purposes and does not give guaranteed figures.

**Once you have made this decision any changes thereafter will normally incur an administrative charge and may result in delay of payment. Details of charges are available on our website. You cannot amend or revoke your lump sum choice once pension benefits are in payment.**

## SECTION 5. Additional Voluntary Contributions or Free Standing AVCs

When we calculate your benefits we will send you a Benefit Crystallisation Certificate with your awarding letter. You must send a copy of this to your other provider(s).

## SECTION 6. Taxation

Further information about the Lifetime Allowance and other tax issues are available from our website. If you are affected by these issues you may wish to look at HMRC website [www.hmrc.gov.uk](http://www.hmrc.gov.uk)

## SECTION 7. Lump sum recycling

Please see HMRCs website for restrictions around recycling of lump sums.

## SECTION 8. Continuing employment or re-employment in the NHS

This section is relevant to all members who are continuing employment or are intending to become re-employed in the NHS. Should you become re-employed (in any capacity) you must notify us immediately as failure to do so may result in an overpayment of benefits.

## SECTION 9. Deferred members only

This section is for completion by members who have their benefits preserved in the pension scheme. The NPA is 60 for members of the 1995 section, 65 for members of the 2008 section and State Pension Age for members of the 2015 scheme. Your preserved pension will be put into payment from your NPA if your application is submitted to us within the required timescale. Members who defer payment

of their preserved benefits will receive their benefits at their chosen date, index linked to the point of payment. Benefits will be backdated to NPA unless you have previously informed the SPPA that you wished to defer taking your benefits.

**SECTION 10. Declaration**

You should ensure that you have completed all relevant parts of the application before signing and dating the declaration. If the declaration is not signed and dated this will result in the application being returned to you and may cause a delay in the payment of your benefits.

**Personal checklist**

You should note here the date that you forwarded your application to your employer for completion of their part. Or, if you have preserved benefits, the date you forwarded this form to SPPA.

Superannuation number:

--	--	--	--	--	--	--	--

Date sent:

		/			/				
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You will be advised of the amount of your retirement benefits when your application has been processed. Please advise us immediately if you change your address or bank before you retire.

The address is:

Scottish Public Pensions Agency  
7 Tweedside Park  
Tweedbank  
Galashiels  
TD1 3TE

You can telephone 01896 893 000.

**You should have your Superannuation (SB) reference number ready.**

SPPA Payroll will be responsible for the payment of your pension and lump sum. If you have any enquiries about payment of your pension benefits after retiral, please telephone 01896 893 000 and ask for "NHS Payroll".

Your pension is assessed as earned income for tax purposes.

Any enquiry about your PAYE code number or your tax liabilities should be sent to:

HM Inspectors of Taxes, Queensway House, Stewartfield Way, East Kilbride, G79 1AA (quoting your surname and NI number) Telephone: 0300 200 3300.

An advice note will be sent when there has been a change in your annual rate of pension or your PAYE tax code. For the first year of your retiral, tax will be based on the total pay and pension received in the year to the last payment before 6 April.



# NHS Pension Schemes Scotland

## Application for Retirement Benefits

(Age, Premature (PREM), Partial Retirement, Voluntary Early Retirement with Actuarial Reduction (VERA) and Preserved)

### PART 1 – TO BE COMPLETED BY THE MEMBER

#### SECTION 1 – PERSONAL DETAILS

Superannuation number

Surname

Former surname(s) (if applicable)

Forenames (in full)

Title  
Dr  Mr  Mrs  Miss  Ms   
Other (please specify)

Date of birth (e.g. 15/04/1943)  
 /  /

National Insurance Number

Contact address

Post code

Home telephone number (incl STD code)

Mobile number

Personal email address

#### TYPE OF RETIREMENT

Active member  
AGE  VERA  PREM  PARTIAL

(FOR MEMBERS OF THE 2008 SECTION and 2015 SCHEME ONLY)

Deferred member  
AGE  VERA

What is your current job title and grade?

(if you have preserved benefits, give last job before leaving the scheme)

On what date do you expect your employment to end? (If preserved, give the approximate date you left the scheme)

 /  / 

Have you applied for, or are you in receipt of any NHS Injury Benefits?

Yes

No

If you have indicated on page 1 that you are applying for Partial retirement, please give the date your contract will change.

 /  / 

If applying for Partial retirement, you can take a minimum of 20% of your benefits Please state the percentage you would like to take now.

 %

For further information on the conditions for Partial retirement, please refer to the guidance notes.

## SECTION 2 – BANK DETAILS

Name of account holder

Branch

Name of Bank/Building Society

Branch Address (related to sort code)

Branch sort code

 –  – 

Post code

Account number

Building society roll number

Bank account type

Current account

Deposit account

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

SPPA will issue the appropriate overseas form to you for completion

### SECTION 3 – DETAILS OF SPOUSE/CIVIL PARTNER/SURVIVING PARTNER

**What is your status?**

(please tick the appropriate box below and, if applicable, provide the relevant date of status change)

Married	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Single	<input type="checkbox"/>									
Divorced	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Widowed	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Civil Partnership	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Dissolution or nullity of civil partnership	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surviving partner*	<input type="checkbox"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

\*Only applicable if you were a member of the scheme after 1 April 2008

**Please give the following information regarding your spouse, civil partner or surviving partner**

Title    Dr     Mr     Mrs     Miss     Ms    Other (please specify)

Surname

Forenames (in full)

Date of birth (e.g. 15/04/1943)  /  /

National Insurance number

If divorced/partnership dissolved, has a court order against part of your pension/lump sum been made?    Yes     No

If yes, is this order for:    earmarking

pension sharing

**SECTION 4 – LUMP SUM CHOICE (PENSION COMMUTATION)**

Please read Section 4 of the guidance notes carefully before making your choice

**An administrative charge will apply if you change your lump sum choice prior to receiving your benefits.**

**Details of this charge can be found on our website: [www.pensions.gov.scot/charges](http://www.pensions.gov.scot/charges)**

Your lump sum choice election cannot be revoked or changed after you are retired and in receipt of your benefits.

If you are a member of the Scheme prior to 1 April 2008 and have no pensionable service on or after this date you will receive a lump sum of three times your pension. You do not have the option to give up part of your pension to increase your lump sum.

**1. If you are a member of the Scheme prior to 1 April 2008 and have pensionable service on or after this date:**

You will automatically receive a lump sum of three times your pension. You have the option to increase your lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes  No  Further information required

If yes, please indicate how much of your annual pension you wish to give up, you can specify the amount per year that you wish to give up or you can give up the maximum allowed. (Restrictions to the amount of tax free lump sum you may commute will depend on HM Revenue & Customs taxation restrictions.)

Max allowed (please tick)  Specific amount (enter amount)

**2. If you are a member of the Scheme joining on or after 1 April 2008 with no pensionable service prior to this date:**

You will not automatically receive a lump sum but have the option to take a lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes  No  Further information required

If yes, please indicate how much of your annual pension you wish to give up, you can specify the amount per year that you wish to give up or you can give up the maximum allowed. (Restrictions to the amount of tax free lump sum you may commute will depend on HM Revenue & Customs taxation restrictions.)

Max allowed (please tick)  Specific amount (enter amount)

**3. If you are a member of the NHS 2015 Scheme, joining on or after 1 April 2015:**

You will not automatically receive a lump sum but have the option to take a lump sum by giving up part of your annual pension. **Do you wish to do this?**

Yes  No  Further information required

If yes, please indicate how much of your annual pension you wish to give up, you can specify the amount per year that you wish give up or you can give up the maximum allowed. (Restrictions to the amount of tax free lump sum you may commute will depend on HM Revenue & Customs taxation restrictions.)

Max allowed (please tick)  Specific amount (enter amount)

If you have ticked yes under questions 1 - 3 above, have you or are you due to receive any tax free lump sum from any other pension provider at your retirement date?

Yes  No

**SECTION 5 – ADDITIONAL VOLUNTARY CONTRIBUTIONS (AVCs)**

Do you have an in house AVC with Standard Life? Yes  No

Do you have an in house AVC with Equitable Life? Yes  No

If you have ticked yes above, we will be in contact with the provider on your behalf. If you have an AVC or FSAVC with a different provider please, send them a copy of the Benefit Crystallisation Certificate which we will send to you with details of your retirement benefits.

## SECTION 6 – HM REVENUE AND CUSTOMS (HMRC) INFORMATION

The Government introduced changes to the amount you can build up towards your pension benefits for tax relief. It is possible that these changes may affect some members who retire from 6 April 2011.

To see if these might impact on you, please see our website at [www.sppa.gov.uk](http://www.sppa.gov.uk)

To comply with HMRC legislation please answer the following questions.

1. Have you any retirement arrangements outside the NHS Pension scheme, whether in payment or not? This includes money purchase AVCs, but excludes the state retirement pension or any survivor or dependants benefits you are being paid.

Yes  Please continue  
No  Go to question 5

2. Will your annual pension from all your pension arrangements, including the NHS Pension scheme be more than £40,000 per year?

Yes  Please continue  
No  Go to question 5

3. Excluding your main NHS Pension scheme benefits, have you taken any pension on or after 6 April 2006?

Yes  Please continue  
No  Go to question 4

a) Please give the combined percentage of LTA used by all your separate pension benefits in payment on or after 6 April 2006 and enclose photocopies of relevant certificates.

%

b) Total amount of lump sum received.

£

c) Date of first Benefit Crystallisation Event.

/  /

4. Excluding your main NHS Pension scheme benefits were any of your separate benefits in payment before 6 April 2006?

Yes  Please continue  
No  Go to question 5

a) Give the annual rate of pension in payment on today's date or date at 3c).

/  /

5. Do you have a valid Fixed, Enhanced, Individual or Primary protection certificate from HMRC?

Yes  No

If so, please enclose a photocopy of your certificate with your completed application.

Please do not send the original.

If individual or fixed protection 2016, please supply the reference number

## SECTION 7 – LUMP SUM RECYCLING

Do you intend to use any part of your lump sum to fund additional pension contributions to another pension arrangement?

Yes  No

If you have answered yes, please confirm the following:

Do all of the retirement tax free lump sums received from all schemes in the last 12 months exceed £7,500?

Yes  No

Does the amount you are investing exceed 30% of your retirement lump sum?

Yes  No

## SECTION 8 – CONTINUING EMPLOYMENT OR RE-EMPLOYMENT IN THE NHS

Before completing this section, please read the “Going back to work” section of the SPPA website. If you do not know this, then you must notify us as soon as the details are known.

Do you intend to continue in your current position or take up further employment in the NHS?

Yes  No

If you have answered yes, please provide the following:

(if this is not currently known, you must provide SPPA with these details **immediately** if you take up further NHS/STSS employment)

Name of employer

Address of employer

Post code

Grade

Annual rate of pay

£

Employment type

Whole time

Part-time

Number of hours per week

Number of sessions

(as a fraction of whole time (i.e. 3/10, 5/11))

When will this employment commence?

/  /

## SECTION 9 – FOR DEFERRED MEMBERS ONLY

1. Have you now ceased all NHS employment in the UK? Yes  No

2. Please state the approximate periods which you were employed in NHS Scotland and indicate whether or not these employments were superannuable:

Date (enter in dd/mm/yy format)		Superannuable	
<input type="text"/>	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<input type="text"/>	<input type="text"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

If you answered 'No' at 1. please state when your NHS Pension scheme employment will terminate  /  /

The following section should be completed if you are claiming your preserved benefits before normal pension age on grounds of Voluntary Early Retirement with Actuarial Reduction (VERA).

Please state which date you would like your NHS Scotland pension to be payable from  /  /

**Please supply a photocopy of your birth certificate with this application form.  
Photocopies of certificates will not be returned.**

## SECTION 10 – DECLARATION

I hereby apply for retirement benefits under the NHS Pension scheme Regulations.

I confirm that I have retired from all NHS employments with the exception of those specified in Section 8.

I understand that, if I am a member of the 1995 section, I may not be eligible to rejoin the scheme during any re-employment in the NHS after receiving my retirement benefits.

I understand that, if I am a member of the 2008 section and have applied for Partial retirement, I will have reduced my reckonable earnings by at least 10% for at least 12 months. I also understand that I am obliged under the NHS Regulations to inform SPPA of any increase in reckonable earnings which affects the above reduction of less than 10%.

I understand that I am obliged under the NHS scheme Regulations to inform SPPA in writing of any continuing or new NHS employment after retirement.

I understand that any overpayment of my superannuation benefits will be recovered by SPPA and must be repaid by me.

I understand that if my existing benefits and any benefits from the NHS scheme at retirement exceed the LTA and I have no transitional protection certificate, the LTA charge will be paid and my benefits reduced accordingly.

I confirm that details given about my LTA are accurate and the certificate(s) are valid and copies enclosed.

If I have Fixed Protection, I declare that I have checked for benefits 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 understand that, as an NHS employee with multiple employments (including medical or dental practitioner) I will complete a retirement application form for each employment.

Please confirm how many application forms you have completed

I declare all of the information I have given on this form is true to the best of my knowledge and belief.

Signed

Date

### Deferred member

If you are a deferred member, please submit the application directly to SPPA with a **photocopy** of your birth certificate. Photocopies of certificates will not be returned.

### Active NHS member

If you are still in NHS employment, please forward the application to your employer directly as soon as possible. Do **not** send it to SPPA as your pensionable pay details are required in part 2 of the form. Do not send birth or marriage certificates.

# PART 2 TO BE COMPLETED BY THE EMPLOYING AUTHORITY

Part 2 should be completed by the **employer** and forwarded to SPPA with Part 1, at least 4 months before the applicant's last day of service. Delay in submission of this application may result in late payment of benefits. Any amendments arising after the submission of this form should be notified to SPPA immediately

## PART 2 – TO BE COMPLETED BY THE EMPLOYER

### SECTION 1 – EMPLOYEE DETAILS

Please complete this section to confirm applicants identity.

Superannuation number

Surname

Forename

Date of birth  /  /

Date of birth confirmed by employer (please tick)  To the best of my knowledge I can confirm this is the date of birth we hold for the member

Inclusive date to which earnings will be paid  /  /

Retirement category Age  Prem  VERA  Partial

Please ensure you complete the relevant sections as shown below:

1995 Members – please complete Section 2A if full time or 2B if part time.

2008 Members – please complete Section 2C if full time or 2D if part time

2015 Members

- if the member has previous service in the 1995 scheme, complete Section 2A or 2B, as appropriate
- if the member has previous service in the 2008 scheme, complete Section 2C or 2D, as appropriate
- if the member only has 2015 service, please complete Section 2C or 2D, as appropriate

If the applicant is retiring on premature ground, please complete Section 3. If the applicant is applying for partial retirement, please complete Section 4.

## SECTION 2A – 1995 SECTION AND 2015 SCHEME MEMBERS – WHOLE TIME OFFICER ONLY

Inclusive date to which earnings will be paid (please include any period of untaken annual leave):

		/			/				
--	--	---	--	--	---	--	--	--	--

Annual rate of salary at date of retirement:

£
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Please select appropriate option:

Officer

Mental Health Officer

Special Class Member

WHOLE TIME OFFICER						
Particulars of service and pensionable pay for the last 3 years (including Domiciliary Consultation fees paid)						
Period to which pensionable pay relates (365 days) with dates if rates change	No of days contributing		Pay (pensionable pay) (i.e. that on which employer's contributions are based)		Dates of unpaid leave during the annual period in column (1)	
	Cont'	Non cont'	Pay exclude other superannuable payments (OSPs)	OSPs		
(1)	(2)	(3)	(4)	(5)	(6)	
Final year						
2nd year						
3rd year						

Total annual pensionable pay (4) + (5)	Final year	2nd year	3rd year

Are pay and OSPs provisional or final?      P       F

Please complete the declaration at Section 2F

**SECTION 2B – 1995 SECTION AND 2015 SCHEME MEMBERS  
– PART-TIME OFFICER & BANK WORKERS ONLY**

Inclusive date to which earnings will be paid (please include any period of untaken annual leave)  /  /

PART-TIME OFFICER Part-time fraction for contracted hours i.e. 20/37.5

Annual whole time equivalent rate of salary at date of retiral  £

PART-TIME OFFICER & BANK WORKERS								
Particulars of service and pensionable pay for the last 3 years (excluding Domiciliary Consultation fees paid)								
Period to which pensionable pay relates (365 days) with dates if rates change  (1)	No of days contributing		Basic part-time pensionable pay (i.e. that on which employers contributions are based)			No of hours (estimate/ actual hours) worked during period in col (1)  (6)	Standard whole time hours for period in col (1)  (7)	Annual whole time equivalent pensionable pay for col (4) with dates of change similar to col (1)  (8)
	Cont'	Non cont'	Actual pay (exclude OSPs)  (4)	OSPs to be uprated by SPPA  (5a)	OSPs not to be uprated by SPPA  (5b)			
Final year								
2nd year								
3rd year								

	Final year	2nd year	3rd year
Total annual pensionable pay (4) + (5)			
Domiciliary Consultation fees			

Are pay and OSPs provisional or final? P  F

Please complete the declaration at Section 2F

**SECTION 2C – 2008 SECTION AND 2015 SCHEME MEMBERS – WHOLE TIME OFFICER ONLY**

Inclusive date to which earnings will be paid (please include any period of untaken annual leave)  /  /

Earnings details for the whole year prior to the final part year (required for all whole time staff)								
Day		Month		Year	Total superannuable pay	Actual number of days worked	Non con days	Dates of unpaid leave
3	1	0	3					

Earnings details for the final part year from 1 April to the inclusive date to which earnings will be paid (please include any period of untaken annual leave)								
Day		Month		Year	Total superannuable pay	Actual number of days worked	Non con days	Dates of unpaid leave
0	1	0	4					

Total pensionable pay for final part year £

Annual rate of salary at date of retiral £

Are pay and OSPs provisional or final? P  F

Please complete the declaration at Section 2F

**SECTION 2D – 2008 SECTION AND 2015 SCHEME MEMBERS  
– PART-TIME OFFICER & BANK WORKERS ONLY**

Inclusive date to which earnings will be paid (please include any period of untaken annual leave)

/   /

Earnings details for the whole year prior to the final part year (required for all part time staff)

Day		Month		Year		Total superannuable pay	Actual number of days worked	Non con days	Dates of unpaid leave
3	1	0	3						

Earnings details for the final part year from 1 April to the inclusive date to which earnings will be paid (please include any period of untaken annual leave)

**Part-time fraction for contracted hours i.e. 20/37.5**

/

Day		Month		Year		Total superannuable pay	Non con days	Dates of unpaid leave	Annual whole time equivalent pensionable pay
0	1	0	4						

Total pensionable pay for final part year

£

Domiciliary Consultation fees paid to an officer over the last 365 days

£

Are pay and OSPs provisional or final?

P

F

Please complete the declaration at Section 2F

**SECTION 2E – PRACTITIONER ONLY  
– PLEASE COMPLETE FOR ALL SECTIONS/SCHEMES**

Period to which entry relates		Total pensionable earnings for period	Notes
Annual return			
Annual return			
Final part year			

Inclusive date to which pensionable earnings will be paid:

/   /

**SECTION 2F – EMPLOYER DECLARATION**

To the best of my knowledge all information given in this form is correct and signed and dated by the member.

Signature

Official designation

Name (in BLOCK LETTERS please)

Employing authority

Address




Post code

Telephone number

Email address

Date

/   /

### SECTION 3 – CERTIFICATION RELATING TO PREMATURE RETIREMENT

#### PREMATURE RETIREMENT or REDUNDANCY

I certify that  will be  
prematurely retired because of redundancy or organisational change   
prematurely retired in the interest of efficiency of the service  (tick as appropriate)

from the post of  as a result, this officers  
inclusive date to which earnings will be paid is  /  /

Capitalised retirement costs are paid by the employer in a lump sum, including costs of retirement from any concurrent employments.

Name of employing authority to which premature retirement costs, including costs of retirement from any concurrent employments should be charged. This certificate should be signed by a senior officer in the Employing Authority who is associated with the decision to accept the voluntary early retirement for the person claiming benefits.

Employing authority name

Employing authority address

Post code

Name of Senior Officer

Signature

Official designation

Telephone number

Date  /  /

## SECTION 4 – PARTIAL RETIREMENT CERTIFICATE BY EMPLOYER

I certify that the particulars given previously are correct and:

- the member is in the 2008 or 2015 section
- the member is in pensionable employment and will remain in at least one employment if there are more than one
- they have reached the minimum pension age of 55 years
- they will incur a reduction in pay of at least 10% of actual pay earned in the 12 months prior to the reduction taking place (in case of concurrent employments, this is from all employments)
- the reduction will remain in place for a period of at least 12 months

Signature	<input type="text"/>
Official designation	<input type="text"/>
Name (in BLOCK LETTERS please)	<input type="text"/>
Employer name	<input type="text"/>
Employer address	<input type="text"/> <input type="text"/> <input type="text"/>
Post code	<input type="text"/>
Telephone no	<input type="text"/>
Email address	<input type="text"/>
Date	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please return the complete application form to  
SPPA, 7 Tweedside Park, Tweedbank, Galashiels, TD1 3TE