

NHS Pensions - Request for an estimate of benefits

Note regarding age estimate requests:

Before completing a request for an age estimate, please check if the member has an annual benefit statement (ABS) available through the Total Rewards Statement (TRS) portal on the Electronic Staff Record (ESR). This statement will provide a current age estimate of benefits.

If you do not have access to ESR, please complete this form and we will inform the member if a statement is available and ask them to view it on My NHS Pension. If no ABS is available, we will provide the estimate.

A redundancy calculator is now available on our website at www.nhsbsa.nhs.uk/employer-hub/technical-guidance/retirement

Employing authority/GP code:

Membership number:

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Date:

National Insurance number:

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- 1995 Section member
 2008 Section member
 2015 Scheme member

Please estimate the benefit(s) ticked above to:

- Age (No ABS)
 Incapacity (AW33E received)
 Commuted incapacity
 Redundancy
- Death (No ABS)
 Dependants (No ABS)
 Interest of efficiency
 Partial retirement
- Voluntary early retirement (VER)

1. Member's details:

Surname:

Employed as:

Other names:

Status (married; single; divorced; civil partner):

2. Total pensionable pay (TPP) and membership details:

In many cases an approximate TPP or the present annual rate of pay will do, **but take care not to overestimate**. If the member needs a more precise estimate, work out the TPP. There is guidance on how to do this on our website.

Complete for all members TPP or annual rate of pay:

Complete for part time members only Notional whole time (WT) TPP or annual rate of pay:

When we provide estimates, we always project membership on the member's current pensionable employment pattern. Below, you can make up to 5 changes to the projected pensionable employment. The shaded row is an example of the information required. The shaded box on the last row should be the same date as you are requesting to estimate to:

From	To	Nature of change - only if moving to WT or part time (PT) or vice versa	New actual hours - only if moving to PT or reducing / increasing hours	New standard hours, to be entered for every period of PT employment fore example, 37.50	Actual sessions (sessional Drs only if remaining PT but reducing / increasing sessions)	Sessions - for sessional Drs only and to be entered for every period of PT employment for example, 11
01/02/2003	01/12/2004	PT	20	38.00	5	11

Practitioners

Pensionable pay from current SD55:

y/e	<input type="text"/>	£ <input type="text"/>
y/e	<input type="text"/>	£ <input type="text"/>
y/e	<input type="text"/>	£ <input type="text"/>
y/e	<input type="text"/>	£ <input type="text"/>
y/e	<input type="text"/>	£ <input type="text"/>

If an estimate figure is used for any year write (E) after the amount.

3. Redundancy details

Is the redundancy employment with a Welsh employing authority?

Yes No

Is the member subject to agenda for change (AFC) terms and conditions?

Yes No

How much is the redundancy payment?

£

4. Partial retirement details

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 a member has benefits in the 1995 Section and the 2015 Scheme, any percentage they take is applied to the 1995 Section first and the remainder to the 2015 Scheme.

1. Does the member require an estimate for only pension benefits based on membership in their legacy scheme (1995/2008 Scheme) up to 31 March 2015?

Yes No Please continue below.

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

1995 Section 2008 Section 2015 Scheme

Or

3. Indicate the overall percentage of pension benefits the member would like an estimate for across all schemes:

1995 Section % 2008 Section % 2015 Scheme %

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

4. If the member has added benefits in the Section or Scheme, they are claiming partial retirement from, do they wish to claim them at the same time?

Yes No

Note that if the elected percentage exhausts a member's 1995/2008 Section or 2015 Scheme benefits, the added benefits from that Section/Scheme will be automatically payable.

5. Additional information

6. Details of the person at the EA / GP practice requesting this estimate

Signature Date / /

Initials Surname

Position

Telephone number EA/GP code

EA / GP practice stamp