

The NHS Pension Choice Opt-In Form

You are being given this form because you are leaving the NHS soon and will have to leave active membership of the NHS Pension Scheme.

You need to complete this form and return it to your employer who will send it to NHS Pensions for action or recording.



This form explains what your options are if your last day of service is on or after 1 October 2009 and you have not yet been given the opportunity to make Your NHS Pension Choice.

Only certain members who are leaving the NHS can use this form to request a personalised Choice Statement. The reasons for leaving and any qualifying criteria are:

- **Retirement.** Members who have a planned retirement date and who qualify for immediate payment of a pension.
- **Taking partial retirement.** Members who wish to take part of their pension and continue working in a reduced capacity. As this is only available from the 2008 Section you will need to make your choice before you partially retire. You must have discussed and agreed the option for you to take partial retirement with your employer.
- **Being made redundant.** Members who are being made redundant and qualify for immediate payment of pension only. Members who are under age 50¹ and cannot apply for their pension immediately, cannot request a personalised Choice Statement using this form.
- **Retiring in the interests of the efficiency of the service.**
- **Leaving the NHS as part of a compulsory transfer of employment outside of the NHS.** Members whose employment is being transferred to an employer who does not have access to the NHS Pension Scheme. Special rules have been agreed for members who are transferred out of the NHS as part of TUPE (Transfer of Undertaking (Protection of Employment) Regulations 2006) or a TUPE like arrangement. Please read the factsheet about compulsory transfer of employment.

¹ If you joined the Scheme on or after 6 April 2006 the minimum age you can retire is changing in 2010 from 50 to 55, even if you remain in the 1995 Section.

Every decision is personal,
especially your pension

Your option

You have a very important decision to make. You are a member of the 1995 Section of the NHS Pension Scheme. On 1 April 2008 a new section of the Scheme was introduced, called the 2008 Section. An exercise is currently taking place to offer all members of the 1995 Section the option to move to the 2008 Section. Members being given this option are being sent a NHS Pension Choice Pack to help them decide whether they wish to move sections. These packs include a personalised Choice Statement.

Due to the size of this exercise, the NHS Pension Choice Packs are being sent to members over a three year period. As you are due to leave the NHS shortly and you have not yet had the opportunity to make Your NHS Pension Choice you are eligible to request a personalised Choice Statement.

Do you want a personalised Choice Statement?

You have to decide whether you want to receive a personalised Choice Statement showing your 1995 Section benefits compared to what they would be in the 2008 Section.

By requesting your personalised Choice Statement you have participated in the NHS Pension Choice Exercise. You will not be offered Choice again.

What next?

Once you have decided what you want to do, you must complete this form.

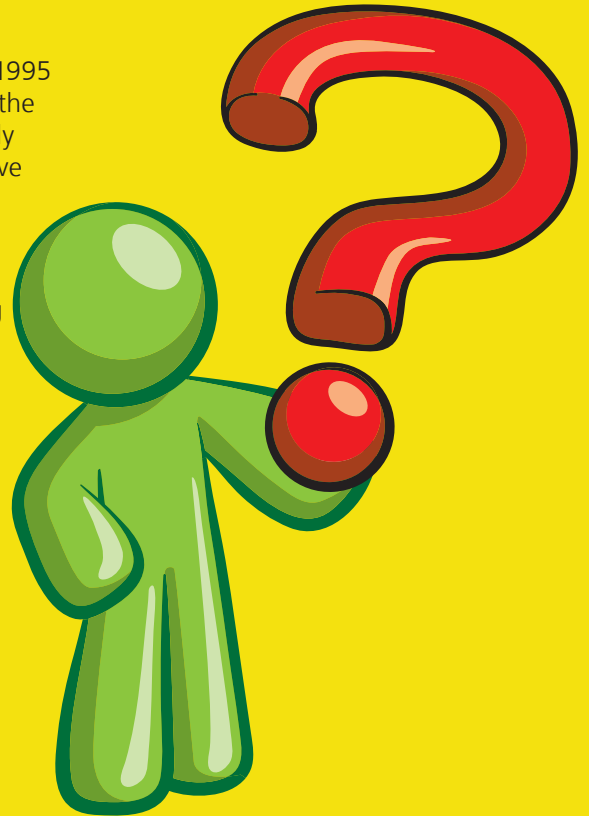
You cannot request a personalised Choice Statement directly from NHS Pensions. This can only be requested by your employer if you have completed this form.

Your employer should have given you a NHS Pension Choice Guide and a DVD which contains a short film. This important information contains some issues you may wish to consider. You should look carefully at this information before completing this form.

A number of factsheets which may be relevant if you are leaving are available on the website. These include:

- Compulsory transfer of employment
- For members with special class status
- For members being made redundant (factsheet to follow shortly)
- For members retiring during the NHS Pension Choice Exercise.

Please note that the benefits in the two sections have many differences, including the normal pension age and the way that benefits are earned and taken. A summary of the differences are detailed in Your NHS Pension Choice Guide and the DVD which you should have received from your employer with this NHS Pension Choice Opt-In Form. You should make yourself aware of the differences and consider how they may affect you before completing this NHS Pension Choice Opt-In Form.



NHS Pension Choice *Opt-In* Form

Pensions

For members who have a leaving date from the NHS and have not yet had a personalised Choice Statement.

Please complete **both sides** of this form to indicate whether you would like to receive a personalised Choice Statement.

Name: _____

SD Number: _____

My reason for leaving is (please tick one of the 5 boxes below)

- Retirement (complete Section A)
- Retiring in the interests of the efficiency of the service (complete Section A)
- Redundancy (complete Section A)
- Partial retirement (complete Section A)
- Compulsory transfer of employment (TUPE) (complete Section B)

My planned last day of service is

Complete Section A or B below and details on the next page

Section A

I am retiring (on the grounds of age, redundancy, in the interests of the efficiency of the service or am taking partial retirement).

Tick one of the boxes below:

NO

I have decided **I do not want** to receive my personalised Choice Statement. I am going to leave my pension benefits in the 1995 Section of the NHS Pension Scheme and I do not want the option to move to the 2008 Section. I understand that this decision is final and that I will receive my pension benefits from the 1995 Section when they are due.

YES

I have decided **I do want** to receive my personalised Choice Statement so that I can decide whether I would like to move to the 2008 Section of the NHS Pension Scheme before I retire or receive my pension benefits from the 1995 Section.

If you have decided that you do want to receive a personalised Choice Statement, your employer will forward your signed NHS Pension Choice Opt-In Form to NHS Pensions and a personalised Choice Statement will be issued to you within 20 working days providing your membership data is complete and up to date. You need to be aware that until you have made Your NHS Pension Choice and your decision has been received and processed, we cannot pay you any pension benefits. If the payment of your pension is delayed whilst you are making Your NHS Pension Choice we will not pay any interest for late payment of your benefits.

Section B

**My employment is being compulsorily transferred outside the NHS (a TUPE or TUPE like transfer).
Please read the factsheet on compulsory transfer of employment.**

Tick one of the boxes below:

NO

I have decided **I do not want** to opt-in to Choice. This means that I will not receive my personalised Choice Statement. I have decided to leave my pension benefits in the 1995 Section of the NHS Pension Scheme. I understand that this means my new employer will offer a pension scheme that is broadly comparable to the 1995 Section.

YES

I have decided **I do want** to opt-in to Choice. This means that I will receive my personalised Choice Statement so that I can decide whether to move my pension benefits to the 2008 Section of the NHS Pension Scheme before my employment is transferred or leave my pension benefits in the 1995 Section.

If you have decided that you do want to receive a personalised Choice Statement, your employer will forward your signed NHS Pension Choice Opt-In Form to NHS Pensions and a personalised Choice Statement will be issued to you within 20 working days providing your membership data is complete and up to date.



Turn over

I understand that the decision I make on this form is final.

Signed: _____ Date: _____

Address: _____

Postcode: _____

Telephone number: _____

Now pass this form to your employer

To be completed by employer

Employer signature:

employer must stamp address here

Employer name: _____

Employer telephone number: _____

EA code: _____

You cannot request a personalised Choice Statement directly from NHS Pensions. This can only be requested by your employer after you have completed this form.