

## Pensions

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If you write or phone please  
quote this reference number

SD /

### NHS Pension Scheme - Refund of pension contributions

**IMPORTANT - Please read these notes carefully before you complete the form, then return it to the Pensions Officer at the place where you last paid pension contributions**

This form only sets out the main rules very briefly. For further details you should ask your Pension Officer for booklet SDK.

Booklet SDK explains what else you can choose to do instead of having a refund of contributions. For example, you may be able to transfer your membership to another scheme.

Briefly these are the main rules.

You **cannot** have a refund of contributions if:

- you are entitled to or are already in receipt of a NHS pension; or
- you continue to do any pensionable work (including bank employment) in the NHS without having a total break of at least 24 hours; or
- you have a period of membership which has been deferred; or
- you have had a transfer of pension rights into the Scheme from a personal pension, regardless of the length of membership.

You **can** have a refund of your contributions if:

- your total membership in the NHS Pension Scheme is less than 2 years. This 2 years includes any qualifying membership. (Qualifying membership is explained in booklet SDK).
- Any AVCs you have will automatically be refunded with your main Scheme contributions. But, if you prefer, depending upon circumstances you may be able to opt to transfer them to another pension provider.

## Applying for a refund

If you want to apply for a refund of your contributions please complete Part A on page 3 of this form. **Then tear off page 3 and give it, or send it, to the NHS Pensions Officer at the place of work where you last paid NHS pension contributions.** Keep pages 1 and 2 of the form for yourself. You may want to look at them again.

## What happens then

Your employer will complete Part B of this form and send it to us. We will deal with your application as quickly as possible.

In most cases we have to make further enquiries before we can pay the refund. If this happens in your case, we will write and tell you.

## Payment of your refund

We can pay your refund in one of four ways.

1. Directly into your bank or building society. This is by far the safest method of payment. Tick the box which applies, on page 3, and fill in your account number, the sort code, account type and roll number if payment is to be made to a Building Society. We also need the name of your bank or building society.
2. To another person of your choice (a nominee). Tick the box which applies, on page 3, and fill in the name and address of your nominee. The payable order will be made out in their name, not yours, and will be sent to their address.
3. Payment to an authorised employer. Tick the box which applies, on page 3, if you wish to be paid by this method and attach a letter of authorisation detailing the name and address of the employer who you wish this money to be paid to.
4. To you at your home address **if you live overseas and do not have a UK bank account.** Just tick the box which applies on page 3. *Payment by this method can take up to 2 weeks longer than payment into a bank account.*

When we send your payment, we will also send a statement to your home address, which will give details of your refund.

## Changes you should tell us about

If you change your address, bank details or your name before we have finished dealing with your application, please tell us straight away so we can make your payment correctly. Our address and phone number are at the top of this form. Please tell us your SD number and your National Insurance number. If you do not know what these numbers are ask your NHS employer, who will be able to tell you.



**Part B - To be completed by the Employing Authority / GP Practice**

National Insurance No.

Pension Reference No.  SD

Last day of membership (extended by any untaken annual leave days)  Day  Month  Year

EA / GP Code No.

**Reason for termination.** Please enter correct code

- 01 - Voluntary resignation
- 02 - Dismissal
- 03 - Redundancy
- 04 - Sickness
- 16 - Opting Out

If membership spans 3 tax years, please enter first year NI earnings (enter 2nd and 3rd year on SD55). If C rate enter £00.00. If E rate enter E £amount. Others enter £amount.  £

Enter 1 here if an election to pay reduced rate NI contributions has ended in the last 12 months

For NHS Pensions use only

Please tick whichever applies

**Only complete this section if you do not have access to Pensions Online**

<input type="checkbox"/> Form SS10 / SS10(GP)	<input type="checkbox"/> is attached	<input type="checkbox"/> sent to NHS Pensions	<input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>
<input type="checkbox"/> Form SD55J	<input type="checkbox"/> is attached	<input type="checkbox"/> sent to NHS Pensions	<input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>
<input type="checkbox"/> Form SD55/SD55(Man)	<input type="checkbox"/> is attached	<input type="checkbox"/> sent to NHS Pensions	<input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>
<input type="checkbox"/> The joiner information was sent to NHS Pensions on Magnetic Tape on			<input type="text"/> Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>

**All Employers must complete these details**

Name (in CAPITALS)

Signature

Date  /  /

Phone number  Ext

EA / GP Stamp