

NHS Pensions – request for an estimated benefit statement

We aim to provide an estimated benefit statement within 40 working days from the date we receive all the information we need.

You will need to complete all Sections of the form. Your completed form can be emailed to pensionscanquery@nhsbsa.nhs.uk. As the form contains personal information, sending it by email is done so at your own risk. The form can also be posted to the address below:

NHS Pensions
PO Box 683, Unit 5
Newcastle Upon Tyne
NE5 9EE

Section One – Your personal details

Surname

Other names

Address

Telephone number

Email address

National Insurance no.

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

Membership number
(if known)

SD			/						
----	--	--	---	--	--	--	--	--	--

If you are acting on behalf of the Scheme member, their written authority to release information to you is required. If this has not already been provided to us, NHS Pensions, please arrange for authorisation to be sent with this form. Please provide your details below and your relationship to the member (such as, solicitor, client, parent, child).

Your name or company name	<input type="text"/>
Relationship to the member	<input type="text"/>
Your address	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>

Any information provided will be sent to the requestor's address.

Section Two – Partial Retirement Estimate Options

Important note: NHS Pensions cannot normally project Practitioner benefits to future dates as we do not know upcoming dynamising and revaluation factors provided to us by HM Treasury on an annual basis.

Guidance

Read the partial retirement factsheet, before completing this section. The partial retirement factsheet is available on our website: <https://www.nhsbsa.nhs.uk/member-hub/partial-retirement>

Partial retirement is applied to your pension benefits in order. For example, if you have benefits in the 1995 Section and the 2015 Scheme, the percentage is applied to your 1995 Section benefits first and the remainder to your 2015 Scheme benefits.

Complete only **ONE** of the following sections:

a) I require an estimate for only the pension benefits based on my membership in the legacy Scheme (1995/2008 Scheme) up to 31 March 2015

Please enter the percentage of your overall benefits provided by the calculator:

%

Note: This is a percentage of your overall benefits and will therefore always be less than 100%.

or

b) I would like an estimate for 100% of my pension from an individual Section or Scheme.

Please tick the relevant box(s) below:

1995 Section ☐

2008 Section ☐

2015 Scheme ☐

or

c) I would like an estimate for the following overall percentage of my pension benefits across all Schemes:

1995 Section % 2008 Section % 2015 Scheme %

Note: If you have pension benefits in two schemes, for example the 1995 Section and 2015 Scheme or 2008 Section and 2015 Scheme you may choose 100% of your 1995 or 2008 Section benefits and some or all your 2015 Scheme benefits.

However, you cannot claim just your 2015 Scheme pension.

You must exhaust benefits from each Section before taking a percentage from the next. Any decoupled benefits are excluded from partial retirement.

Selected payable date

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

Section Three – Added benefits

If you have added benefits in the Section or Scheme you are considering claiming retirement from, do you wish to claim them at the same time?

Yes ☐ No ☐

Section Four - Declaration

Signature

Name (please print)

Date

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

How we use your information

The NHS Business Services Authority – NHS Pensions will use the information provided for administering your NHS Pension Scheme membership and processing payment of your NHS pension benefits. We may share your information to administer and pay your NHS pension, enable us to prevent and detect fraud and mistakes, for debt collection purposes, or as required by law. For more information about who we share your information with and how long we keep your personal data and your rights, please visit our website at www.nhsbsa.nhs.uk/yourinformation