

NHS Pensions – request for an estimated benefit statement

Note: Please check the table below to see if your request is chargeable. If your estimate is not chargeable you do not need to complete the attached form. Please contact our helpline on 0300 330 1346.

If you have previous or existing Practitioner membership, please use the **Practitioner estimate request form**.

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

Estimate type	What will be provided	Charge
Annual Benefit Statement	This is normally provided to members automatically each year, via the Total Reward Statement portal. This includes a current estimated benefit statement and details of the pension benefits which may be payable on death.	No charge
Estimated benefit statement - where a Total Reward Statement is not available and where an estimated benefit statement has not been requested in the past 12 months	An estimated Annual Benefit Statement. For fully protected members of the 1995/2008 Scheme, benefits will be projected to normal pension age. For non-protected members and members of the 2015 Scheme, benefits will be projected to the date our records have been updated by the employer.	No charge
Estimated ill health benefits - where an ill health retirement claim form (AW33E or AW240) has been submitted to NHS Pensions	An estimate of pension benefits payable on early retirement on the grounds of ill health.	No charge
Estimated draw down benefits on partial retirement	An estimate of pension benefits based on the partial retirement date and the percentage of benefits for draw down, as specified in the request.	No charge
Estimated benefits on premature retirement / redundancy / interests of efficiency (IOE)	An estimate of pension benefits for premature retirement where minimum pension age has been reached. Note: this type of request can only be accepted from an employer.	No charge

<p>Early retirement</p>	<p>An estimate of pension benefits payable on early retirement.</p> <p>This type of request can only be accepted from a member who is taking their pension under age 55 and is within 12 months of their normal minimum pension age of 50.</p> <p>Note: this is because the early retirement factors are not currently available in the calculator on our website for members in this group.</p>	<p>No charge</p>
<p>Protection of pay or multiple breaks in membership</p>	<p>An estimate of pension benefits taking account of protection of pay or multiple breaks in membership.</p> <p>This type of request can only accepted from members who are within 12 months or have passed their normal pension age</p>	<p>No charge</p>

Part 1 – Estimate options and applicable charges

Please select the option below that applies to your request.

	Estimate option	What you will receive	Charge (inc. VAT)										
<input type="checkbox"/>	<p>Benefits payable at normal pension age</p> <p>Estimate of benefits projected to a different date than on the latest Annual Benefit Statement.</p> <p>Please confirm the date:</p> <table border="1" data-bbox="225 589 756 645"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table> <p>(Only available for protected members of the 1995/2008 Scheme)</p>			/			/					<p>An estimate of pension benefits at the date specified.</p>	<p>£75</p>
		/			/								
<input type="checkbox"/>	<p>Benefits payable at normal pension age</p> <p>Estimate of benefits at a specified date including protection of pay/multiple breaks in membership, where normal pension age has not been met and/or the retirement date is not within 12 months of the date of this request.</p> <p>Please confirm the date:</p> <table border="1" data-bbox="225 1088 756 1144"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table> <p>(Only available for protected members of the 1995/2008 Scheme)</p>			/			/					<p>An estimate of pension benefits at the date specified.</p>	<p>£75</p>
		/			/								
<input type="checkbox"/>	<p>Benefits payable at normal pension age</p> <p>A request for an additional estimated benefit statement at a specified date made within 12 months of any earlier request.</p> <p>Please confirm the date:</p> <table border="1" data-bbox="225 1532 756 1588"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table>			/			/					<p>An estimate of pension benefits at the date specified.</p>	<p>£75</p>
		/			/								
<input type="checkbox"/>	<p>Ill health retirement</p> <p>Early retirement on the grounds of ill health at a specified date where a retirement claim form has not been submitted to NHS Pensions or where an ill health estimate has been requested within the past 12 months.</p> <p>Please confirm the date:</p> <table border="1" data-bbox="225 1942 756 1998"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table>			/			/					<p>An estimate of ill health pension benefits at the date specified</p>	<p>£75</p>
		/			/								

<input type="checkbox"/>	<p>Hypothetical pension benefit calculation</p> <p>Such as a calculation for which no pension benefit entitlement currently exists.</p>	<p>An estimate of benefits based on the hypothetical circumstances specified at Part 2.</p>	<p>£120 per estimate</p>											
<input type="checkbox"/>	<p>Early retirement benefits for members who do not meet the criteria for a free estimate</p> <p>Please indicate the intended early retirement date:</p> <table border="1" data-bbox="225 613 756 667"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table>			/			/					<p>An estimate of the reduced pension benefits payable at the date specified.</p>	<p>£75</p>	
		/			/									
<input type="checkbox"/>	<p>Draw down (partial retirement benefits – not available for 1995 Section members)</p> <p>A request for an additional draw down estimate made within 12 months of an earlier request.</p> <p>Please indicate the intended partial retirement date:</p> <table border="1" data-bbox="225 947 756 1001"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table> <p>(This must be on or after your 55th birthday).</p> <p>Please indicate the percentage of benefits you wish to draw down:</p> <table border="1" data-bbox="225 1196 437 1249"> <tr> <td></td> </tr> </table> <p>%</p> <p>(You can draw between 20% and 80% of your NHS pension benefits)</p>			/			/						<p>An estimate of draw down benefits according to the information specified.</p>	<p>£75</p>
		/			/									
Total amount payable			<p>£</p>											

Please note: these charges are reviewed annually.

Part 2 – Additional information

Please add below any further information which will help ensure we provide you with the correct information. Please continue on a separate sheet if required.

Part 3 – Member's 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 NHS Pensions, please arrange for authorisation to be sent with this form. Please provide your details below and also your relationship to the member (e.g. solicitor, client, parent, child etc.).

Your name or company name

Relationship to the member

Your address

Telephone number

Email address

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

Part 4 - Declaration

- I agree to pay the applicable charge for provision of the information specified at Parts 1 and 2 of this form.

Signature

Name (please print)

Date

		/			/				
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Part 5 - Payment

Please confirm which of the following payment methods you have chosen:

- Bank transfer payment**

The bank account details for electronic payments are as follows:

Sort code: 60-70-80

Account number: 10021205

Your reference must include the National Insurance number of the member followed by their surname. Your request cannot be processed without this information.

You need to email a copy of this form to nhsbsa.pensionsmember@nhsbsa.nhs.uk or use the following postal address:

NHS Pensions
PO Box 2269
Bolton
BL6 9JS

- Cheque**

The cheque should be made payable to 'NHS Business Services Authority', enclosed with this form and posted to:

NHS Pensions
PO Box 2269
Bolton
BL6 9JS

All charges include VAT at the standard rate of 20%

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