

NHS Pensions – Request for an estimated benefit statement

Notes: 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. If you want to request a non chargeable estimate please contact our helpline on 0300 330 1346.

Once all the information we need has been received, we aim to provide this information within our 40 working day target from the date of receipt.

Estimate option	What you will receive	
Annual Benefit Statement	This is normally provided to members automatically each year, via the Total Reward Statement portal. Where available, this includes a current estimated statement of benefits along with details of the pension benefits payable upon death.	No charge
Ill health retirement Early retirement on the grounds of ill health where a retirement claim form has been submitted to NHS Pensions	An estimate of pension benefits payable if the member retires early on the grounds of ill health. (estimated to the latest date we have received pay and pension information from your employer) Please contact our helpline to request your estimate.	No charge
Redundancy / Interests of Efficiency (IOE) – this applies to hospital employments only Request made directly through the employer.	Please request through your employer	No charge
Estimate of draw down benefits	An estimate of benefits, based upon the partial retirement date and the percentage of benefits to draw down, as specified in your request.	No charge

Part 1 – Estimate options and applicable charges

Please select the option below that applies to your request.

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 the Government Actuaries Department on an annual basis.

	Estimate option	What you will receive	Charge (inc. VAT)										
<input type="checkbox"/>	Benefits payable at normal pension age	Benefits will be calculated to the date we have received the latest pay and pension details from your employer. For deferred members, cost of living increases will be applied.	£75										
<input type="checkbox"/>	A request for an additional benefit statement made within 12 months of an earlier request	Benefits will be calculated to the date we have received the latest pay and pension details from your employer. For deferred members, cost of living increases will be applied.	£75										
<input type="checkbox"/>	Ill health retirement Early retirement on the grounds of ill health 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.	An estimate of pension benefits payable if the member retires early on the grounds of ill health. (estimated to the latest date we have received pay and pension information from your employer)	£75										
<input type="checkbox"/>	Redundancy / Interests of Efficiency (IOE) Request made direct to NHS Pensions. Please indicate the premature retirement date: <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; text-align: center;">/</td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px; text-align: center;">/</td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>			/			/					An estimate of pension benefits for retirement due to redundancy or in the interest of efficiency at the date specified.	£75
		/			/								
<input type="checkbox"/>	Hypothetical pension benefit calculation Such as a calculation for which no pension benefit entitlement currently exists.	An estimate of benefits based on the hypothetical circumstances. Please note we may need to contact you for further details to provide this information.	£120 per estimate										

<input type="checkbox"/>	<p>Early retirement benefits</p> <p>You must be over or within 12 months of your minimum pension age.</p> <p>Please indicate the intended early retirement date:</p> <table border="1" data-bbox="225 427 756 483"> <tr> <td></td><td></td><td>/</td><td></td><td></td><td>/</td><td></td><td></td><td></td><td></td> </tr> </table> <p>We can only project benefits to a date within 12 months from the request date, based on estimated values of your latest pay details</p>			/			/					<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 1003 756 1059"> <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 1249 437 1305"> <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>
		/			/									
<p>Total amount payable</p>			<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.

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Membership number (if known)

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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