

Member guidance for completing application form STSS: (RET)

You should retain these for future reference

These guidance notes are designed to help you complete the Application for retirement benefits and you may find it helpful to read the Pre retirement, Taxation, Lump sum choice, Transferring benefits and Re-employment factsheets **prior** to completing this. If you have an added years or additional pension contract you should also look at the additional pension factsheet so that you are aware of your options at retirement.

Certain sections are only specific to either Preserved members (those who have left the scheme and have deferred taking their benefits until Normal Pension Age) or to those who are applying for Premature or Phased retirement.

So that we can pay your benefits on time, you should make sure that your employer submits your application to us at least 3 - 4 months prior to your intended date of retiral. Although you may complete your application on time, your employer still has to provide information to us. If you have preserved benefits, please forward your completed application directly to SPPA. If you supply your email address, we will acknowledge your application by email.

If you are currently in teaching employment your employer will confirm your date of birth, therefore you do not need to send a birth certificate as it will not be returned to you.

If you are a preserved member, we **will require to see a photocopy of your birth certificate**. This will not be returned to you therefore do not send an original certificate.

If you need to contact us during the application process, please email Teachersawards@scotland.gsi.gov.uk. If however, you need to speak to someone about your application, you will be asked which department you wish transferred to. You should ask for "Teachers Awards" until your benefits are calculated and for "Payroll" after your pension goes into payment. You should have your superannuation number ready. The checklist attached provides contact details should you need to call us.

When you retire, we will write to you advising how much your benefits are, when they will be paid and details about taxation. We will not send you a pension advice note every time a payment is made to you. Your benefits may be subject to revision if your employer sends a change in retirement date or revised pensionable pay details. Any overpayment that occurs will be recovered from you. In addition, any additional amount payable will be treated as a separate benefit crystallisation event.

If you are still working as a teacher, after completing all relevant details in Part 1, you should return your application to your employer for completion of Part 2. They will send it to SPPA.

If you are no longer working as a teacher and have preserved your benefits, please complete and send your application directly to SPPA.

PART 1. SECTION 1. Personal details (to be completed in all cases)

Please complete all fields with the information requested. Your superannuation number will be on any previous correspondence that we have sent you. You should complete the six digit number only with no prefixes or slashes. Example 303030. If, however, you do not know this, please ensure your date of birth and National Insurance number are completed.

If you have an email address we will acknowledge receipt of your application and we will not, under any circumstances, supply this information to another party.

TYPE OF RETIREMENT - Please select the correct type of retirement relevant to you.

Active members (currently contributing to the scheme)**Age retirement (AGE)**

If you were a member of the STSS prior to 1 April 2007 your Normal Pension Age (NPA) is 60. If you leave and return to pensionable service after a break of more than five years, your NPA will still be 60 in respect of your earlier service, but it will be age 65 for your future service. If you joined the scheme on or after 1 April 2007, your NPA is 65.

Premature retirement (PRC)

Your employer must certify that your employment has come to an end because of redundancy and agree to pay mandatory compensation. Premature retirement benefits may be payable to you if you are aged 55 or over.

Actuarial Reduced Pension (ARP)

You can apply for a reduced pension and lump sum between age 55 and 60 if you were in service prior to 1 April 2007. If you joined the scheme on or after 1 April 2007, you can apply for your reduced benefits anytime between ages 55 and 65. You must have pensionable service or excluded employment on or after 1 July 2002 and qualify for retirement benefits.

Phased retirement

You can apply for Phased retirement if you are aged 55 or over, will reduce your pay by at least 20% for a period of at least 12 months and remain in at least one employment if you have more than one. You must leave at least 25% remaining.

Preserved member (no longer contributing to the scheme)**Age retirement (AGE)**

Preserved members who were in the scheme prior to 1 April 2007 can claim their preserved benefits from age 60, providing that they are not in teaching employment in Scotland at that time. Preserved members who were in the scheme on or after 1 April 2007 can claim their preserved benefits from age 65 providing they are not in teaching employment in Scotland at that time.

Actuarial Reduced Pension (ARP)

Preserved members can apply for Actuarial Reduced benefits from age 55 if they were in service on or after 1 July 2002.

SECTION 2. Bank or Building Society details

If you have any difficulties completing this section, please contact your bank or building society who will be able to assist you. We will pay your retirement benefits into the account that you request here and you should ensure that all relevant fields are completed accurately. The details required can be found on your bank card or statement and you should ensure that the correct sort code, account number and/or Building Society Roll number are entered. If any of these details are wrong this may result in payments being made to the wrong account. If this occurs we will need to have these funds returned prior to making payment to an amended account.

Pension payments are made on the last banking day of each month and these are paid directly into your nominated bank account. Payment is made monthly, in arrears and you will receive 1/12th of the annual amount to the nearest penny. However, the first payment may be a proportion of one month's payment if your pension started partly through the month. If we are in receipt of all the relevant information on time, lump sum payments (if applicable) will normally be paid into your nominated bank account within one month of your date of retirement.

If your bank account is out with the UK, please indicate the country your bank is based in and you will be issued with the appropriate Transcontinental Automated Payment Service (TAPS) form.

If any of your personal or bank details change, please notify us **immediately** as a delay may result in late payment of your benefits.

SECTION 3. Details of wife/husband/civil partner/nominated non legal partner

All fields within this section should be completed as appropriate to your circumstances. This information will assist in dealing with any benefits payable in the event of your death. Certificates are **not required** to be presented at this stage but will be asked for when death benefits are claimed.

The option of Nominated/Declared Partner is only available to scheme members with contributing service on or after 1 April 2007. If you have not previously nominated/declared a partner and wish to do so, please ensure you complete form: "PARTNER NOM", available from our website. Anyone who left the scheme prior to 1 April 2007 cannot nominate/declare a partner to receive their pension.

SECTION 4. Lump sum choice election

This means electing to give up part of your pension in exchange for a tax free lump sum or to increase your lump sum.

All members of the scheme who were in service on or before 1 April 2007, have the option to elect to commute part of their pension to increase their tax free lump sum. Members who joined the scheme on or after 1 April 2007 have the option to elect to commute part of their pension to obtain a tax free lump sum. If your service was preserved prior to 1 April 2007 the option to increase your tax free lump sum is not available. To increase the tax free lump sum or to obtain a tax free lump sum, there will be a reduction in your annual pension. You will need to give up £1 of annual pension for every £12 received as a lump sum. However, there is a maximum lump

sum that can be taken, as allowed by HM Revenue & Customs, of 25% of the fund value. How this is calculated is shown below.

If you were a member of the scheme before 1 April 2007 and were in service on that date, the formula for calculating the maximum amount of lump sum benefits that can be paid is as follows:

$$\frac{(\text{pension} \times 20) + (\text{lump sum} \times 20/12)}{4.6667}$$

Your pension will reduce by £1 for every £12 of additional lump sum taken. You may choose to take an additional lump sum up to the maximum. Please note that you cannot give up any part of your normal lump sum to increase your pension.

If you joined the scheme on or after 1 April 2007, there is no automatic entitlement to a lump sum. The formula for calculating the maximum amount of lump sum is as follows:

$$\frac{\text{pension} \times 20}{4.6667}$$

You may choose elect to take a lump sum of any amount up to the maximum. Please see our website www.sppa.gov.uk where a pensions calculator is available if you wish to investigate further about how electing to convert some of your pension into a higher lump sum would affect your retirement benefits. This should only be used for illustrative purposes and does not give guaranteed figures. You may also wish to consider seeking independent financial advice before making this decision.

The application also offers the opportunity to request further information regarding your lump sum choice prior to you making your election. To allow your retirement award to be processed on time, it is important that you have this election completed and returned to SPPA as soon as you have made your decision. Any delay in returning the election could result in your benefits being paid late.

Please note that changing your lump sum choice election will incur an administrative charge and must be done prior to your benefits being put into payment. Details of the administrative charge can be found on our website www.sppa.gov.uk.

Your lump sum choice election cannot be revoked or changed once you are retired and receiving your benefits.

SECTION 5. Additional Voluntary Contributions (AVCs) or Free Standing AVCs

When we calculate your benefits we will send you a Benefit Crystallisation Certificate with your awarding letter. You must send a copy of this to your provider if this is not with our in house AVC provider the Prudential.

If you have an in house AVC with Prudential please tick the box and we will be in contact with them on your behalf.

SECTION 6. Past Added Years (PAY)/Additional Pension Benefits (APB)

If you have a contract to purchase added years you have the option, prior to retirement, to purchase the remaining added years in your contract. This must be done before proceeding with your retirement application and cannot be purchased using your retirement benefits.

If you have a contract to purchase additional pension you will be credited with your benefits up to your date of retirement, but do not have the option to purchase the remaining benefits.

SECTION 7. Other teaching service

If you have service with any of the schemes listed and would like to transfer the service in to the STSS this must be done **before** you reach normal pension age. Please complete the application to transfer, as soon as possible, which is available from our website www.sppa.gov.uk

Proceeding with the transfer will delay the payment of your benefits as the transfer must be completed before your benefits can be calculated.

SECTION 8. Taxation

Further information about the Lifetime Allowance and other tax issues are available from our website at www.sppa.gov.uk. If you are affected by these issues you may wish to look at HMRC's website www.hmrc.gov.uk.

SECTION 9. Lump sum recycling

Please see HMRC website for restrictions around recycling of lump sums.

SECTION 10. Re-employment in the STSS

This section is relevant to all members who are continuing employment or are intending to become re-employed in the STSS. To be eligible to access your pension benefits you must terminate your employment for at least one calendar day. Failure to do so could result in your pension benefits being suspended and SPPA seeking re-imbursalment on payments made. Should you become re-employed (in any capacity) you must notify us immediately as failure to do so may result in an overpayment of benefits.

SECTION 11 - Declaration

You should ensure that you have completed all relevant parts of the application before signing and dating the declaration. If the declaration is not signed and dated this will result in the application being returned to you and may cause a delay in the payment of your benefits.

If you are an active teacher you should return the application to your employer. If you are a preserved member this should be sent directly to SPPA.

Personal checklist

You should note on this checklist the date that you forwarded your application to your employer for completion of their part. Or, if you are preserved, the date you forwarded this form to SPPA.

Superannuation number

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Date sent

		/			/				
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You will be advised of the amount of your retirement benefits when your application has been processed. Please advise us immediately if you change your address or bank before you retire.

The address is:

Scottish Public Pensions Agency (STSS)

7 Tweedside Park

Tweedbank

Galashiels

TD1 3TE

You can telephone 01896 893000 and ask for "Teachers Awards". You should have your Superannuation reference number ready.

SPPA Payroll will be responsible for the payment of your pension and lump sum. If you have any enquiries about the payment of your pension benefits after retiral, please telephone 01896 893000 and ask for "Payroll".

Your pension is assessed as earned income for tax purposes.

An advice note will be sent when there has been a change in your annual rate of pension or your PAYE tax code. For the first year of your retiral, tax will be based on the total pay and pension received in the year to the last payment before 6 April.

Any enquiry about your PAYE code number or your Tax Liability should be sent to:

HM Inspector of Taxes, Ty Glas, Cardiff, CS4 5YA (quoting your surname and NI Number)

Telephone: 0845 300 3949.

SCOTTISH TEACHERS' SUPERANNUATION SCHEME (STSS) APPLICATION FOR RETIREMENT BENEFITS

(Age, Premature (PRC), Phased retirement, Actuarial Reduced Pension (ARP) and Preserved)

PART 1 - TO BE COMPLETED BY THE MEMBER

SECTION 1 – PERSONAL DETAILS

Superannuation number

Surname

Former surname (if applicable)

Forenames (in full)

Title
 Dr Mr Mrs Miss Ms

Other (please specify)

Date of birth (e.g. 15/04/1943)
 / /

National Insurance number

Contact address

Post code

Home telephone number (incl STD code)

Mobile telephone number

Email address

Type of retirement

Active member
 AGE ARP PRC PHASED

Preserved member
 AGE ARP

What is your current job title? (If preserved, give last job before leaving the scheme)

On what date do you expect your employment to end? (If preserved, give the approximate date you left the scheme)

		/			/				
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Please state which date you would like to retire from the STSS

		/			/				
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If applying for Phased retirement, please give the date your contract will change

		/			/				
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If applying for Phased retirement, you can take up to a maximum of 75% of your benefits. Please state the percentage you would like to take now

%

SECTION 2 – BANK DETAILS

Name of account holder

Name of Bank/Building society

Branch

Branch address

Post code

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Branch sort code

		-			-		
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Account number

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

Building Society roll no.

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

Bank account type

Current account

Deposit account

If your bank is outside the UK, please indicate which country your pension will be paid to

SPPA will issue the appropriate TAPS form to you for completion.

SECTION 3 – DETAILS OF WIFE/HUSBAND/CIVIL PARTNER/NOMINATED NON LEGAL PARTNER

What is your status? (please tick the appropriate box below and, if applicable provide the relevant date of status change)

Married	<input type="checkbox"/>	Date	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Single	<input type="checkbox"/>						
Divorced	<input type="checkbox"/>	Date	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Widowed	<input type="checkbox"/>	Date	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Civil partnership	<input type="checkbox"/>	Date	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Nominated/Declared partner	<input type="checkbox"/>						
Dissolution or nullity of civil partnership	<input type="checkbox"/>	Date	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/>	/	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please give the following information regarding your spouse, civil partner or nominated/declared partner

Title Dr Mr Mrs Miss Other

Full name

Date of birth (e.g. 15/04/1943) / /

National Insurance number

If divorced/partnership dissolved, has a court order against part of your pension/lump sum been made? Yes No

If yes, is this order for: earmarking
pension sharing

SECTION 4 – LUMP SUM CHOICE (PENSION COMMUTATION)

If you are not currently an active member of the STSS and had your benefits preserved in the scheme before 1 April 2007 please go to section 5.

Do you want to give up part of your pension in order to receive a tax free lump sum or to increase your lump sum?

Yes No Further information required

Please read the guidance notes before making your election. An administrative charge will apply if you change your lump sum choice prior to receiving your benefits. Details of this charge can be found on our website www.sppa.gov.uk.

Your lump sum choice election cannot be revoked or changed after you are retired and in receipt of your benefits.

If you have ticked yes above, please indicate how much you wish to give up. Restrictions to the amount of tax free lump sum you may commute will depend on HM Revenue & Customs taxation restrictions.

Max allowed (please tick) Specified amount (enter amount)

If you have ticked yes above, have you or are you due to receive any tax free lump sum from any other pension provider at your retirement date

Yes No

SECTION 5 – ADDITIONAL VOLUNTARY CONTRIBUTIONS (AVCs)

Do you have an in house AVC with the Prudential? Yes No

If you have ticked yes above, we will contact the Prudential on your behalf. If you have an AVC or FSAVC with a different provider please send them a copy of the Benefit Crystallisation Certificate which we will send to you with details of your retirement benefits.

SECTION 6 – PAST ADDED YEARS (PAY)

Are you currently purchasing Past Added Years (PAY)? Yes No

If yes, would you like to pay the outstanding contributions prior to retirement

or, accept the service paid for up to the date of retirement

SECTION 7 – OTHER TEACHING SERVICE

Do you have any other pensionable teaching employment in ENGLAND and WALES, NORTHERN IRELAND, the CHANNEL ISLANDS or the ISLE OF MAN which has not previously been transferred into the STSS?

Yes No

If yes, would you like to transfer this service into the STSS?
The transfer of benefits must be done before processing your retirement application. Payment of your benefits may be delayed.

Yes No

You must complete form TVINCBS which can be found on our website.

If you would like to proceed with the transfer, please supply the following information

Period of employment		Name and address of employer	Name of superannuation scheme or pension fund and ref number (if any)
From	To		

SECTION 8 – HM REVENUE & CUSTOMS (HMRC) INFORMATION

The Government introduced changes to the amount you can build up towards your pension benefits for tax relief. It is possible that these changes may affect some members who retire from 6 April 2011. To see if these changes might impact you, please see our website www.sppa.gov.uk

To comply with HMRC legislation please answer the following questions.

1. Have you any retirement arrangements outside the STSS, whether in payment or not? This includes money purchase AVCs, but excludes the state retirement pension or any survivor or dependants benefits you are being paid.

Yes Please continue
 No Go to question 5

2. Will your annual pension from all your pension arrangements, including the STSS, be more than £40,000 per year?

Yes Please continue
 No Go to question 5

3. Excluding your main STSS benefits, have you taken any pension benefits on or after 6 April 2006?

Yes Please continue
 No Go to question 4

a) Please give the combined percentage of LTA used by all your separate pension benefits in payment on or after 6 April 2006 and enclose relevant certificates.

%

b) Please give the total amount of lump sum received.

£

c) Date of first Benefit Crystallisation Event

/ /

4. Excluding your main STSS benefits were any of your separate benefits in payment before 6 April 2006?

Yes Please continue
 No Go to question 5

a) Gross annual rate of pension in payment on today's date or date at 3 c)

£

5. Do you have a valid Fixed, Enhanced or Primary protection certificate from HMRC?

Yes
 No

If yes, please enclose a photocopy of your certificate with your completed application. Do not send an original as this will not be returned to you.

SECTION 9 – LUMP SUM RECYCLING

If you intend to use any part of your lump sum to fund additional pension contributions to any other pension arrangements, please state the following:

Do all of the retirement lump sums received from all schemes in the last 12 months exceed 1% of the current HMRC Lifetime Allowance?

Yes No

Does the amount you are investing exceed 30% of your retirement lump sum?

Yes No

SECTION 10 – RE-EMPLOYMENT IN THE STSS

Before completing this section, please read the [“Re-employment”](#) factsheet

Do you intend to take up further teaching employment in the STSS?

Yes No

If you have answered yes, please provide the following:

Name of employer

Address of employer

Post code

Grade

Annual rate of pay £

Employment type

Whole time	<input type="checkbox"/>		
Part time	<input type="checkbox"/>	Number of hours per week	<input style="width: 80px; height: 25px;" type="text"/>

When will this employment commence / /

SECTION 11 - DECLARATION

I hereby apply for retirement benefits under the regulations governing the Scottish Teachers' Superannuation Scheme (STSS).

I understand that I am obliged under STSS regulations to inform SPPA in writing of any continuing of new STSS employment after retirement.

I understand that if I have applied for Phased retirement, I will have reduced my reckonable earnings by at least 20% for at least 12 months. I also understand that I am obliged under STSS regulations to inform SPPA of any increase in reckonable earnings which affect the above reduction of less than 20%

I understand that any overpayment of my superannuation benefits will be recovered by SPPA and must be repaid by me.

I will inform SPPA if there are changes to the retiral date or any other information I have provided.

I confirm I have read the guidance and understand the lump sum choice(s) I have made is irrevocable once retired and receiving benefits. I understand that if I change my lump sum choice prior to receiving my benefits, there will be an administrative charge.

I understand that if my existing benefits and any benefits from the STSS at retirement exceed the LTA and I have no transitional protection certificate, the LTA charge will be paid and my benefits reduced accordingly.

I confirm that details given about my LTA are accurate and the certificate(s) are valid and copies enclosed.

If I have Fixed Protection I declare that I have checked for benefits accrual (Note 2 on the certificate for Fixed Protection refers) and have not had benefit accrual up to and including the date of my retirement.

I declare that all of the information I have given on this form is true to the best of my knowledge and belief.

Signed

Date

Preserved member

If you are a preserved member, please submit the application directly to SPPA with a photocopy of your birth certificate. Photocopies of certificates will not be returned.

Active STSS member

If you are still in STSS employment, please forward the application to your employer directly as soon as possible. Do not send it to SPPA as your pensionable pay details are required in part 2 of the form. Do not send birth or marriage certificates.

PART 2

TO BE COMPLETED BY THE EMPLOYING AUTHORITY

This form should be completed by the employer and forwarded to the Scottish Public Pensions Agency (SPPA) at least 3 – 4 months before the applicant’s last day of service. Delays in submission of this form may result in late payment of benefits.

Any amendments arising after submitting this form should be notified to SPPA immediately.

Leaver details must be notified to SPPA within three months of termination date.

SECTION 1 – PERSONAL DETAILS – FOR ALL EMPLOYEES

Superannuation number

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

Forename

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Surname

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Date of birth

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Date of birth confirmed by employer

To the best of my knowledge I can confirm this is the date of birth we hold for the member. Birth certificates need not be sent if this box has been ticked.

Inclusive date to which earnings will be paid

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Retirement category

Age

ARP

PRC

Please also complete section 3

Phased

Please also complete effective date and section 4

Date phased retirement effective from:

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Please ensure you complete section 2D – Employer’s declaration.

SECTION 2A – DETAILS OF PENSIONABLE SALARY FOR FULL TIME STAFF

Information supplied must be in 365 days format

Period used for return date needs to be for the financial year preceding date of retirement.

Return date						Salary rate	Number of days worked
Day	Month		Year				
3	1	0	3				

To date of leaving

Leaving date						Salary rate	Number of days worked
Day	Month		Year				

Final year's salary increases, any unpaid leave and periods of acting up in the last 10 years.

Start date			End date			Number of days worked	Annual rate of Salary	Reason
Day	Month	Year	Day	Month	Year			

Is pay to date of leaving provisional or final?	Provisional <input type="checkbox"/>	Final <input type="checkbox"/>
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Please ensure you complete the employer's declaration at Section 2D

SECTION 2B – DETAILS OF PENSIONABLE SALARY FOR PART TIME STAFF

Information supplied must be in 1365 hours format

Period used for return date needs to be for the year preceding date of retirement

Return date						Salary rate	Number of hours worked	Full time equivalent hours e.g 1365 or 1820
Day		Month		Year				
3	1	0	3					

To date of leaving

Leaving date						Salary rate	Number of hours worked	Full time equivalent hours e.g 1365 or 1820
Day		Month		Year				

Final year's salary increases, any unpaid leave and periods of acting up in the last 10 years.

Start date			End date			Number of hours worked	Annual rate of salary	Reason
Day	Month	Year	Day	Month	Year			

Is pay to date of leaving provisional or final? Provisional Final

Please ensure you complete the employer's declaration at Section 2D

SECTION 2C – DETAILS OF PENSIONABLE SALARY FOR SUPPLY STAFF

Information supplied must be in 1365 hours format

Period used for return date needs to be for the year preceding date of retirement

Return date						Salary rate	Number of hours worked
Day	Month		Year				
3	1	0	3			LONG TERM SUPPLY	
3	1	0	3			SHORT TERM SUPPLY	

To date of leaving

Leaving date						Salary rate	Number of hours worked
Day	Month		Year				
						LONG TERM SUPPLY	
						SHORT TERM SUPPLY	

Final year's salary increases, any unpaid leave and periods of acting up in the last 10 years.

Start date			End date			Number of hours worked	Annual rate of Salary	Reason
Day	Month	Year	Day	Month	Year			

Is pay to date of leaving provisional or final? Provisional Final

Please ensure you complete the employer's declaration at Section 2D

SECTION 2D – EMPLOYER DECLARATION

To the best of my knowledge all information given in this form is correct and signed and dated by the member.

Name of employer

Name (BLOCK
CAPITALS)

Telephone number

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Email address

Signed

Date

		/			/				
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SECTION 3 – CERTIFICATION RELATING TO PREMATURE RETIREMENT

Employer declaration

A full description of mandatory and discretionary compensation if available from the Employers guide

I certify that who is aged 55 or over, is retiring from their teaching post at on the grounds of redundancy*/in the interest of the efficient exercise of the employers function* with effect from / /

* delete as appropriate

I also agree that the above named is entitled to payment of his/her retiring allowances under regulation E6(6) of the Teachers' Superannuation Scheme (Scotland) Regulations 2005 (as amended) and therefore entitled to mandatory compensation.

Is the member also being paid a discretionary enhancement? Yes No

Do you wish to pay SPPA capitalisation costs for:

- mandatory compensation? Yes No
- discretionary compensation? Yes Amount No

Please note that in addition to the capitalisation costs there will also be an administration charge, details of which are on the website.

If the teacher is receiving discretionary compensation not paid by SPPA please give details of the provider

Name of provider

Address of provider

Post code

Telephone number

This certificate should be signed by a senior officer in the Employing Authority who is associated with the decision to accept the voluntary early retirement for the person claiming benefits. Please ensure to supply us with a valid email address as the salary, service and pension details will now be sent out via email.

Employing authority

Position

Telephone No Email

Signed Date

SECTION 4 – PHASED RETIREMENT CERTIFICATE BY EMPLOYER

I certify that the particulars given previously are correct and:

- there will be a reduction in the member’s contributable salary of 20% or more as compared with the average rate of contributable salary in the six months prior to the end of his/her previous employment
- that this reduced new salary rate will not exceed 80% of the previous salary for a period of 12 months from the date of the salary reduction, ignoring standard pay increases
- all contributions properly payable under the regulations governing the STSS have been or will be deduction from the salary.

Salary after phased retirement

£

Employer name

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Employer address

Post code

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Name (in BLOCK caps)

--

Telephone number

--

Email address

--

Signed

--

Date

--