Guidance notes for Additional Pension application

Note 1

From 1 April 2008 members of the NHS Superannuation Scheme Scotland can purchase additional pension in multiples of £250 up to a maximum of £5,000.

If you choose to take out more than one additional pension contract, the value of any previous additional pension purchased will be taken into account when calculating the new cost to ensure that the maximum amount allowable is not exceeded.

Note 2

When taking out an election to purchase additional pension you must choose whether or not to include dependant’s benefits.

Note 3

You can decide if your ‘chosen birthday’ will be either 60 or 65 if one of the following statements applies to you:

- you are an active member with service in the scheme prior to 1 April 2008
- you have service in any other comparable British scheme prior to 1 April 2008 without a break in service of more than 5 years

Your ‘chosen birthday’ would be 65 if one of the following statements applies to you:

- you are an active member who joined the scheme after 1 April 2008

Please note you are only required to complete one box for paying by a single payment or paying in instalments.

Note 4

Please note that if you are paying by instalments, the period over which these are paid must be a number of whole years from 1-20 and cannot end later than your ‘chosen birthday’.
ELECTION TO PURCHASE ADDITIONAL PENSION

SECTION 1 – PERSONAL DETAILS
Superannuation number

Surname

Former surname (if applicable)

Forenames (in full)

Title

Mr  Dr  Ms  Mrs  Miss

If other, please specify

Date of birth (e.g. 15/04/1973)

Gender

Male  Female

Contact address

Postcode

Home telephone number (including STD code)

Mobile telephone number

Email address

National Insurance number

SECTION 2 - OPTIONS
I wish to purchase additional pension of £ per annum (note 1)

I wish to purchase additional pension for (note 2)

Please tick one only

Personal benefits only

Personal benefits and dependant benefits

I wish to pay by (note 3)

Single payment

Instalments from salary

Please state your chosen birthday (either 60 or 65)
Please state the number of whole years over which instalments are to be made (note 4)
If you are currently working for more than one employer please specify which employment deductions should be taken from

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SECTION 3 - DECLARATION

- the information given in this form is true to the best of my knowledge
- I have no reason to believe that my health prevents me from continuing in pensionable employment until the payment period is completed
- I understand that the actuarial factors used to calculate my additional pension are based on my chosen birthday
- If I take out an additional pension contract and I retire, taking my pension before the elected payable age, the amount I receive may be reduced as it is being paid earlier than expected

Signed __________________________________________________________________________ Date __________ / ______/ ______

To be completed if employer is purchasing additional pension on behalf of the member

EMPLOYER STAMP

Please return the completed form to: SPPA, 7 Tweedside Park, Tweedbank, Galashiels, TD1 3TE