

Guidance for completing form STSS: (RET Part 2 & 3)

Please note, all fields in grey are for illustration purposes only. Please complete and return this form at least 3 months [preferably 4 months] prior to intended retirement date.

SECTION 1 - Personal details (to be completed in all cases):

The employer's reference field is for your own use and to be completed as you see fit.

Please complete all other fields as appropriate.

Guidance on retirement types can be found on the reverse of this document.

SECTION 2 - Details of Pensionable Salary (to be completed in all cases):

To last return date:

Please provide details of the annual return proceeding the date of retiral e.g. retiral date of 31/02/09 would have return details to 31/03/08; retiral date of 30/04/09 would have return details to 31/03/09. Please estimate the figures if not known.

To date of leaving:

This will provide the information from the last return date to the date of leaving. Please estimate the figures if not known.

Salary increases and unpaid leave:

If the member has received salary increases within the last 365 days, please provide details of the different salaries earned and the dates these were earned for.

SECTION 3 – Certificate by Employer (to be completed in all cases):

Please complete all fields as appropriate.

PART 3 – Early Retirement Employer's Certificate

ONLY to be completed for PRC

Please complete all fields as appropriate. The 'effect from' date should be the day after the last day of pay. This form replaces AW82.

If you have any questions please do not hesitate to contact us.

Additional Retirement Information:

The members guidance describes the following types of retirement:

Age retirement:

Age Benefits are payable at the following normal pension ages or the day after cessation of all pensionable employment (whichever is later). If you were in pensionable service prior to 1 April 2007, your Normal Pension Age (NPA) is 60. If you entered pensionable service for the first time on or after 1 April 2007, your NPA is 65. If you 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 65 for your future service.

Actuarially reduced pension (ARP):

To apply for ARP Retirement Benefits you must be between the age of 55 and 60 on the payable date if you were in service before 1 April 2007. If you joined the scheme on or after 1 April 2007 you must be between age 55 and 65. In addition you must have:

- pensionable service or excluded employment on or after 1 July 2002;
- qualified for retirement benefits;
- an ARP pension which is at least the value of the state guaranteed minimum pension.

Premature retirement:

Premature Retirement Benefits may be payable if you are aged 50 or over, you were a member prior to 1 April 2007 and your employer agrees that you may be awarded premature retirement benefits. If you joined the scheme on or after 1 April 2007 the minimum age is 55. Your employer must certify that your teaching employment has come to an end because of redundancy or in the interest of the efficient discharge of the employer's functions. The employer must agree to pay mandatory compensation.

You are not entitled to premature retirement benefits if you:

- are paying contributions under the current added years arrangements;
- are currently applying for or are in receipt of ill-health benefits.