

Armed Forces Pension Schemes Application Form

Part A - Service and Personal details

Service Unit Section

Unit phone number & Dial Code

Rank	Initials	Surname (in block capitals)	Service number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title (Mr, Mrs, Miss, Ms, Dr, Rev) Trade or Specialist Qualification

National Insurance number (On JPA self service user)

Date of birth DD MM YY Termination date (On JPA self service user) DD MM YY

Reason for leaving (tick appropriate box)

End of engagement Early release Medical

Contact address on leaving the Armed Forces. All communications will be sent to this address.

Address

 Postcode

Phone number

Mobile phone number

Email address

Please make sure you answer all the relevant questions. If you need help contact your unit HR admin staff or JPAC on 0800 085 3600.

Go to Part B

Part B - Payment of pension benefits

This section is for you to tell us if you are entitled to any Immediate Benefits. Please tick the appropriate box (Immediate Benefits are pension benefits and resettlement grants payable at time of termination).

I am not entitled to any Immediate Benefits **Go to Part J**

I am claiming Immediate, Aggregated Benefits (MMP/116 Re-employment booklet refers:)

Please complete either Parts C and D or Parts E and F relevant to your scheme.

Part C - AFPS 75 - Please tick the appropriate boxes

Immediate Pension and Terminal Grant	<input type="checkbox"/>	Resettlement Grant	<input type="checkbox"/>
Resettlement Commutation	<input type="checkbox"/>	Life Commutation	<input type="checkbox"/>
Special Capital Payment (Redundancy only)	<input type="checkbox"/>	Invalidating Benefits	<input type="checkbox"/>

Go to Part D

Part D - Application to commute part of pension (AFPS 75 only)

You must read the rules relating to the Resettlement Commutation and Life Commutation Schemes before completing this section. See **DIN 2009 DIN01-054** and **DIN 2009 DIN01-169**.

The Resettlement Commutation option can be exercised once only and must be made before your last day of service.

I want to commute under Resettlement Commutation **Yes - complete box a or b**
 No - go to Part G

a) The maximum allowed b) The following amount £

You can check the amount on the pension calculator at: <http://83.138.137.164:8080>

If you qualify for Life Commutation you **must** apply 9 months before your last day of service.

I am eligible and I want to commute under Life Commutation **Yes** **No**

Please send me an application form

Go to Part G

Part E - AFPS 05 / RFPS - Please tick the appropriate boxes

Pension and pension lump sum	<input type="checkbox"/>	Resettlement Grant	<input type="checkbox"/>
Inverse Commutation	<input type="checkbox"/>	EDP and EDP lump sum	<input type="checkbox"/>
Compensation lump sum (Redundancy only)	<input type="checkbox"/>	Ill-Health Benefits	<input type="checkbox"/>

I have **nominated** a person / organisation to receive any lump sum upon my death and I have completed **AFPS Form 2**. **Yes** **No**

I have **allocated** a portion of my pension to a dependant who is financially dependant on me and have completed **AFPS Form 3** and, if necessary, **AFPS Form 3A**. **Yes** **No**

Go to Part F

Part F - Application for Inverse Commutation of Pension (AFPS 05 / RFPS only)

(See booklet MMP/123 (RFPS) or MMP/124 (AFPS05) or visit the MOD website for more information.)

I have elected to make an Inverse Commutation of a portion of my tax-free lump sum to increase my / my dependant's taxable annual pension and have completed AFPS Form 9.

Go to Part G

Part G - Retirement lump sums

Important note - Please read as this may impact on your future financial well-being.

Further details on the recycling of Pension Lump Sums can be found at:

<http://www.hmrc.gov.uk/manuals/rpsmanual/rpsm12200035.htm>

or by calling the HMRC helpline on **0115 974 1600**.

The notes below are for your guidance only. If in doubt please discuss this matter with HMRC in the first instance.

If you intend to use some or all of your Pension Lump Sum to re-invest in another pension arrangement, known as 'Recycling', special rules apply. If you **do not intend to re-invest** at this time in another pension arrangement, answer **no** to question (i) below and **go to Part H**.

- Please note:**
- SPVA has a legislative duty to record pension re-investment, inform Her Majesty's Revenue and Customs (HMRC) of your investment intent and report breaches of the recycling rules.
 - The SPVA report to HMRC does not remove the legislative requirement for you to independently report your investment or investment intent to HMRC.

If you **intend to re-invest** some or all of your Pension Lump Sum into another pension arrangement and your Pension Lump Sum is less than 1% of the Lifetime allowance (£1.8m - 2010/2011 rates x 1% = £18,000.00) the pension recycling rule (effective 06 Apr 06) does not affect you. If this is the case your answer to question (ii) below will be **no** and you should then **go to Part H**.

If the amount which you are re-investing in another pension arrangement is less than 30% of your Pension Lump Sum, the pension recycling rule does not affect you. If this is the case your answer to question (iii) below will be **no** and you should then **go to Part H**.

Warning. If you **re-invest** and **breach** the current recycling allowance, HMRC consider this to be an unauthorised (Pension Scheme) member payment and you will be liable to tax on the reinvested amount at **40%** which will also attract a further **15% pension surcharge** i.e you will be liable to a tax charge of 55%.

- (i): Do you intend to use any part of your lump sum to fund additional pension contributions to any other pension scheme? **Yes** **No**
- (ii): Does your retirement lifetime lump sum exceed 1% of the Lifetime Allowance? (i.e, £1,800,000 (2010/2011 rates) x 1% = £18,000) **Yes** **No**
- (iii): Does the amount you have invested / are investing exceed 30% of your retirement lump sum? **Yes** **No**

Go to Part H

Part J - Declaration and signature

I confirm that the information I have given is accurate and complete to the best of my knowledge and belief.

I understand that

- I must immediately tell the Ministry of Defence of anything that may affect my entitlement to, or the amount of, an award under the Armed Forces Pension Schemes, or an award paid under any other scheme administered by the SPVA, including any changes of address.
- if I knowingly give false information, I may be liable to prosecution.

Signature of applicant

Date

Please return the completed form to:

SPVA (G), Pensions Division, MP 480, Kentigern House, 65 Brown Street, Glasgow, G2 8EX

In accordance with the Data Protection Act 1998, the Ministry of Defence will collect, use, protect and retain the information on this form in connection with all matters relating to personnel administration and policy.

IMPORTANT

You must complete and return the completed form; otherwise we will not pay any Terminal Benefits. Please enter your name, address and service number in the boxes provided below. We will acknowledge receipt of the form within 28 days. We cannot start to process your claim until the day after your termination date.

With compliments



We have received your AFPS Form Pen 1 dated

SPVA (G) Pensions
MP 480
Kentigern House
65 Brown Street
Glasgow G2 8EX
Freephone: 0800 085 3600

Name
Address
Postcode

Service number