

Parliamentary Contributory Pension Fund

Retirement Options form (age 75)

Your details (please complete in BLOCK CAPITALS)

| | |
|-------------------------|---------------|
| Title, decorations, etc | |
| Surname | Forenames |
| NI no. | |
| Home address | |
| | Postcode |
| Date of birth | Telephone no. |
| Mobile no. | Email |

Claiming your benefits

A. I am standing down from my 75th birthday (tick one box)

- I elect to receive the maximum tax-free cash sum and reduced pension (as detailed in the covering letter) from my 75th birthday, as I shall be standing down.
- I elect to receive my full pension from my 75th birthday as I shall be standing down.
- I elect to take a specified lump sum of £ _____

Allocation of pension (tick if required) - If you are contributing to the Ministerial Pension Scheme you can give up some of your benefits to provide an extra pension for a dependant. Please contact RPMI for more details regarding this option.

B. I am not standing down before I turn 75 (tick one box)

- I elect to receive the maximum tax-free cash sum (as detailed in the covering letter) and suspend payment of my reduced pension in excess of the GMP until I cease to be an MP.
- I elect to suspend payment of my full pension in excess of the GMP until I cease to be an MP and to not receive a tax-free cash sum.
- I elect to continue to contribute to the Scheme.
- I elect to take a specified lump sum of £ _____

Allocation of pension (tick if required) - If you are contributing to the Ministerial Pension Scheme you can give up some of your benefits to provide an extra pension for a dependant. Please contact Buck for more details regarding this option.

Payment of pension

Please pay my pension into the following bank/building society account

| | |
|--------------------------|------------|
| Sort code | Account no |
| Roll no. (if applicable) | |
| Account holder name | |

Payment of tax-free cash sum

Please pay the tax-free cash sum (tick one box):

- into the same bank/building society account as my pension (detailed above)
- by cheque sent to my home address
- into my bank/building society account detailed below:

| | |
|--------------------------|------------|
| Sort code | Account no |
| Roll no. (if applicable) | |
| Account holder name | |

Lifetime Allowance (tick as appropriate)

I confirm that the value of my PCPF pension plus the value of all my other pensions which are currently being paid to me or will come into payment on or before my PCPF pension is paid:

- will not exceed the Lifetime Allowance (LTA)
- will exceed the Lifetime Allowance and I attach a Pension Protection Certificate
- will exceed the Lifetime Allowance. I do not have a Pension Protection Certificate

Calculating your Lifetime Allowance (LTA)

In assessing whether or not your pension entitlements exceed the LTA, please complete the following calculations:

- Multiply your PCPF pension by 20. If you decide to take a tax-free cash sum, you should multiply your reduced pension by 20 and then add the tax-free cash sum to this figure.
- Multiply the current annual pension you receive from other arrangements (where the first payment was made before 6 April 2006) by 25.
- For pensions from other pension arrangements paid, or transferred overseas, after 5 April 2006, total the value of the LTA used up from each pension. These figures should have been provided to you upon retirement or transfer.

Important notes

- Do not include any benefits paid by the State in b) and c).
- Should a tax charge be levied by HMRC as a result of incorrect information being supplied in relation to the overall value of all your pension entitlements and/or protection of your benefits, you will be personally liable for the tax charge.

Certificates

I enclose the following documents: (tick as appropriate)

These will be returned immediately by recorded delivery

- Original birth certificate/passport
- Original marriage certificate/civil partnership certificate
- Original spouse's/civil partner's birth certificate/passport

| Signed | Date |
|--------|------|
|--------|------|

Please return this form to:

PCPF Administration Team, Parliamentary Contributory Pension Fund, Buck (Bristol), PO Box 319, Mitcheldean GL14 9BF

Administered by Buck: PCPF, PO Box 319, Mitcheldean GL14 9BF DL1 9FP. **T:** 0330 123 0634 **E:** PCPF@buck.com **W:** www.myPCPFpension.co.uk

The Trustees, the Secretariat and their advisers, and the administrators of the Fund, will process personal data in relation to you in order to administer the Fund. This may include sensitive data (as defined in the Data Protection Act 1988). In accordance with the Data Protection Act 1998, all information concerning Fund members and their dependants will be treated by the Trustees and their advisers as confidential. If you wish to inspect any data that is held about you, please contact the administrators of the Fund.