

HSC Pension Scheme benefit estimate request from 1 April 2019 for members

Introduction

This form is to be completed when you are requesting a chargeable estimate of benefits.
More information about the charges can be found on the website at:

<http://www.hscpensions.hscni.net/>.

Part 1 – Your personal details

Surname

Other names

Address

Telephone Number

Email Address

National Insurance No.

Membership No.(if known)

Part 2 – Declaration

- I have read the Estimate of Benefits Factsheet provided on the website:
- I have included EST1 application form
- I would like HSC Pension Service to provide the following pension benefit estimates:

Estimate Type	What is provided to members?	Does HSC Pension Service have to provide this information?	Charges to Members applicable from 1 April 2019
Age estimate within 12 months of NPA (first request i.e.no request within previous 12 months)	Age – An estimate of pension benefits at normal pension age	NPA Age – Yes	No
Age estimate (second or more within 12 months of HSC Pension Service receiving your first request)	Age – An estimate of pension benefits at normal pension age	No	£45
Estimate – Any hypothetical calculation, which is in addition to a member's entitlement	Information based on hypothetical circumstances	No	£45
IFA Requests (including requests from other authorised third parties)	An estimate request, or request for HMRC related data from an Independent Financial Advisor (or other authorised third party)	No	£45
Individual Protection 2016 (IP2016) Valuation		No	£120
Transfer Value Type	What is provided to members?	Does HSC Pension Service have to provide this information?	Charges to Members applicable from 1 April 2019
The first request for a CETV or SoE (Statement of Entitlement)	The value of pension benefits if you decide to transfer to another Registered Pension Scheme and the request is within age and time limits <ul style="list-style-type: none"> ○ CETV – Active members ○ SoE – Deferred members 	Yes ***	No

A second or more request for a CETV or SoE (Statement of Entitlement) made within 12 months of HSC Pension Service receiving your first	The value of your pension benefits if you decide to transfer to another Registered Pension Scheme and the request is within age and time limits ○ CETV – Active members SoE – Deferred members	No	£408
A replacement SoE (Statement of Entitlement) required where the scheme option forms are not returned within 3 months of the guarantee date	The value of your pension benefits if you decide to transfer to another Registered Pension Scheme and the request is within age and time limits (The value is guaranteed for three months from the guarantee date) **	No	£408
CETV – Any hypothetical calculation, which is in addition to a member's entitlement	Information based on hypothetical circumstances	No	£408
IFA Requests	A request for a CETV or SoE from an Independent Financial Advisor on behalf of a member	No	£408
P60	What is provided to members?	Does HSC Pension Service have to provide this information?	Charges to Members applicable from 1 April 2019
Original P60	A summary of your pension and the tax that has been deducted in the financial year	Yes	No
Duplicate P60 (requested within 12 months of being issued)	A summary of your pension and the tax that has been deducted in the financial year	No	No
Second duplicate P60 (requested within 12 months or original & copy being issued)	A summary of your pension and the tax that has been deducted in the financial year	No	£15

** The Occupational Pension Schemes (Disclosure of Information) Regulations 1996 requires schemes to provide this information at no charge to Scheme Members.

*** The Occupational Pension Schemes (Transfer Values) Regulations 1996

I have referred to the 'Schedule of Charges', I agree to pay the charges and enclose a cheque for the full amount

Signature

Print your name

Date

Part 3 – I enclose the following document:

A Cheque for amount payable (all cheques should be made payable to 'Business Services Organisation')

Letter of authority from HSC Pension Service Member

Please return to:

HSC Pension Service

Waterside House, 75 Duke Street, Londonderry, BT47 6FP

All charges include VAT at the standard rate of 20%