



This is an ONLINE ONLY form.

# Personal Details and Declaration Form

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## Your personal details

Name

Date of birth

Member number

Scheme

alpha

Staff/PI number

NI number

Please complete this section by putting an X in one box below to indicate your choice.

## Compensation choice

**I do not wish to leave on the compensation terms as set out in this Quote.**

Please complete Section 1 of the **Personal Details and Declaration** section, sign and date the Declaration and return it to your employer by their deadline date.

**I wish to leave on the compensation terms set out in this Quote. I am leaving on the date shown on this Quote or on such other date I have agreed with my employer, in accordance with the rules of the Civil Service Compensation Scheme.**

Please complete the appropriate sections of the Compensation Declaration Form(s) to tell us your choices, sign and date the Declaration and return it to your employer by their deadline date.

## Personal Details and Declaration

### Section 1 – Personal details (see the data protection section below)

Surname

Forename(s)

Employee number

NI number

## Section 2 – Information for your compensation and pension benefits (as applicable) (see the data protection section below)

Date of birth

Home address

Postcode

Home telephone number

Personal email address

### Your marital status details

Please tick the box that applies to you. Please note that you only need to return the required certificate if you are a former member of the classic or classic plus scheme.

Single

I have never been married or in a civil partnership

Divorced

I enclose the original or General Register Office (GRO) copy of my decree absolute

Widowed

I enclose the original or General Register Office (GRO) copy of the death certificate

Married

I have completed the details below

Civil partnership

I have completed the details below

Civil partnership dissolution or death of civil partner

I enclose the original or General Register Office (GRO) copy of my final order certificate or my partner's death certificate

## Current spouse or civil partner's details

Signature

Full name

Title

Mr

Mrs

Miss

Ms

Other (please state)

Spouse or civil partner's date of birth

Male or female

Male

Female

## Your payment details – Only complete if you are taking your pension now

Please provide us with your bank or building society account details:

Sort code

Account number

Building society roll number

Name of account holder(s)

Name of bank/building society

Address

Postcode

## Your payment details

**We cannot pay your benefits into an account with the National Savings Bank.**

**We can make payment to an account in the Irish Republic or overseas, but you will need to ask us for a mandate form for the country concerned. The mandate will ask you to provide the following details:**

- **your account name and number**
- **your bank's name and address**
- **your bank's Swift Code**
- **your bank's International Bank Account Number (IBAN).**

**Not all countries use the IBAN system, but your bank should be able to clarify this.**

**We can only pay your benefits into an account in your own name or a joint account you hold. This will be paid in the local currency of your bank, not in sterling.**

If you have not already sent a copy of your Compensation Scheme Information Form and you are divorced or widowed or your civil partnership has come to an end, please include an original or certified copy of either:

- your decree absolute
- your former spouse or civil partner's death certificate
- your civil partnership dissolution order.

Any certified copies of certificates will normally only be accepted if they have been provided by the General Register Office (GRO).

## Tax – only complete if you are taking your pension now

### IMPORTANT

There is no limit on the level of benefits that you can be provided with under a registered pension scheme. However, there is a set level of tax-free lump sum benefits that you are able to draw from all registered pension schemes in your lifetime.

The Lump Sum Allowance (LSA) limits the amount of tax-free lump sum you can receive from your pensions at retirement.

The LSA is £268,275. This is equal to 25% of the Lifetime Allowance (LTA) in place before 6 April 2024 (£1,073,100).

The Lump Sum and Death Benefit Allowance (LSDBA) limits the amount of tax-free lump sum you can receive during your lifetime or when you die. The LSDBA is £1,073,100.

**Please note:** LSA/LSDBA limits may be higher if you have a Lifetime Allowance protection.

More information about both allowances can be found at [www.gov.uk](http://www.gov.uk)

We must check details of all your other pension benefits either in payment, or that you may take, up to and including your date of retirement. If you have a pension entitlement following death e.g. a spouse or dependant's pension, these benefits do not count towards your LSA and do not need to be included. (Please note this DOES NOT include State Pension and Pension Credit.)

**Please note:** your Civil Service Pension Scheme benefits cannot be paid until the information requested below is provided. All sections of the form must be completed.

**Q1.** Have you applied to HMRC and been granted a personalised protection entitlement such as primary, fixed or enhanced protection that you wish to rely on at this time? Yes      No

If you have answered "Yes", please provide a copy of the certificate(s) provided by HMRC which confirm your entitlement.

**Q2.** Are you currently in receipt of a pension or pensions, including any other Civil Service pension benefits or any benefits from an additional voluntary contribution arrangement, which started **before 6 April 2006**? Yes      No

<b>Q3.</b> Have you received pension and/or lump sum benefits from any other registered pension schemes <b>on or after 6 April 2006 and before 6 April 2024</b> ?	Yes	No
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<b>Q4.</b> If you answered yes to either Q2 or Q3, do you have a transitional tax-free amount certificate that you would like to provide to us?	Yes	No
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If you have answered **"Yes"**, please provide us with a copy of your transitional tax-free amount certificate.

If you answered **"NO"**:

For benefits which came into payment **before 6 April 2006**, please confirm, the total current annual amount of pension you receive (before tax) from **all** sources (except for State pension and/or a survivor pension in your own right).

£

For benefits that came into payment **on or after 6 April 2006 and before 6 April 2024**, you should have been given a statement from the Administrator of the other scheme(s) confirming the amount of your lifetime allowance used up. Please enclose the statement(s) (copies) with this declaration and tell us the number of certificates/statements attached.

<b>Q5.</b> Have you received any lump sum benefits from any other registered pension schemes <b>on or after 6 April 2024 and before the date of retirement shown on your quotation</b> ?	Yes	No
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If you have answered **'Yes'**, you should have been given a statement from the Administrator of the other scheme(s) confirming the amount of your lump sum allowance used up. Please enclose the statement(s) (copies) with this declaration and tell us the number of certificates/statements attached.

<b>Q6.</b> Do you intend to take any lump sum benefits from any other registered pension schemes, <b>at the same time</b> as taking your Civil Service pension benefits?	Yes	No
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If you have answered **'Yes'**, you will need to get an estimate of the expected lump sum allowance which will be used up under the other scheme(s) from the Administrators of those arrangements and send copies to us.

**Q7.** If your answer to **question 6** was 'Yes', you need to decide in what order you will take your benefits from each scheme, so the lump sum allowance test can be done. This is particularly important where you are likely to go over your lump sum allowance limit, as the order in which benefits are taken will decide which scheme or schemes will be responsible for capping your lump benefit, should these exceed the LSA. You should include in your decision any Civil Service Pension benefits you are taking.

**Name of scheme/  
policy number**

**Contact details**

**Order in which taken  
(first, second, etc.)**

## Recycling of retirement lump sums – only complete if you are taking your pension now

Please read the NOTE below and then answer these questions.

We will use your answers to assess whether a tax charge may apply.

**Q1.** Do you intend to use any part of your lump sum to fund additional contributions to the Civil Service pension scheme or to any other Pension arrangement? Yes      No

If the answer is “Yes”, please answer the question below:

**Q2.** How much of your Civil Service lump sum do you intend to pay into a pension arrangement (this includes Additional Voluntary Contribution Arrangements)? £

### Note

You may intend to use part, or all of your pension lump sum to pay additional contributions into the alpha pension scheme, or to any other pension arrangement. This is known as ‘recycling’ and special tax rules may apply. If you break the recycling rules, you will have to pay tax up to 55% of the value of your lump sum. The recycling rules will not affect you if:

- your retirement lump sum, together with any other pension lump sum paid in the preceding 12 months, is less than £7,500, or
- the contribution you intend to pay, or have paid in anticipation of receiving your pension lump sum, is less than 30% of your pension lump sum.
- You will be subject to the recycling rules if:
  - you increase your contributions in the two tax years before or after your retirement, or in the tax year that your pension lump sum is paid, and
  - this is a pre-planned means of using the lump sum due at a future date (for example, by using the lump sum to replenish savings that you have used to make contributions to a pension arrangement).

You can find guidance on recycling on the HM Revenue & Customs website:

[www.gov.uk/hmrc-internal-manuals/pensions-tax-manual/ptm133810](http://www.gov.uk/hmrc-internal-manuals/pensions-tax-manual/ptm133810).

If, after reading the HMRC guidance notes, you are still unsure whether the recycling rules affect you, you should speak to an independent financial advisor or contact HMRC using the details on the link below:

[www.gov.uk/find-hmrc-contacts/pension-schemes-general-enquiries](http://www.gov.uk/find-hmrc-contacts/pension-schemes-general-enquiries)

## Voluntary deductions from your pension – only complete if you are taking your pension now

If you require deductions for certain organisations to be made from your pension, please supply the details below. Enter the rate of deductions you wish to be made from your pension.

For Benenden Health Care, enter the rate being deducted from your pay at retirement. For the Civil Service Sports Council, the rate will be calculated at 90% of the current full membership rate; please enter the reduced rate to be deducted:

Name of organisation	Code	Policy number (if applicable)	Amount of monthly deduction

At the end of this form, you will find a list of voluntary deductions the organisations and their codes. This list does not include a code for Give As You Earn (G.A.Y.E) payroll giving. This is because the process to set up charitable deductions from your pension is different. If you wish to contribute to charity in this way, please contact Charitable Giving, Union Mine Road, Pitts Cleave, Tavistock, PL19 OPW. Their telephone number is 0182 261 1180. They will send you an application form so that you can tell them how much you wish to give to your chosen charity. Once they have made the arrangements to pass on your donation to the charity concerned, they will let us know. We will then commence deductions from your pension and pay the amount over to Charitable Giving each month.

## Death benefit nominee

If you think your death benefit nominee details are wrong, please complete a new nomination form, available at [www.civilservicepensionscheme.org.uk/memberhub](http://www.civilservicepensionscheme.org.uk/memberhub)

Alternatively, you can contact us on 0300 123 6666.

## Data protection

Your employer and the Scheme Administrator will only use the information contained in this form to calculate your compensation and preserve your pension for payment at Normal Pension Age. The Cabinet Office manages the Civil Service Pension Schemes arrangements and the Civil Service Compensation Scheme. The Scheme Administrator administers the schemes on behalf of your employer.

We will pass the information contained in this form, together with details of your service history, to the Scheme Administrator. They will use it to administer any pension payments and to provide analysis for management and statutory returns. The Scheme Administrator has a duty to protect the public funds it administers, and to this end may use the information we hold about you for the prevention and detection of fraud. We may also share this information with other bodies responsible for auditing or administering public funds for these purposes. The scheme is committed to managing your data in line with the Data Protection Legislation. For more information about how your data is managed please visit: [www.civilservicepensionscheme.org.uk/privacy-policy/](http://www.civilservicepensionscheme.org.uk/privacy-policy/)

## Declaration – you must sign the declaration below

I certify that the information I have given on this form, or as I have amended, is to the best of my knowledge and belief correct.

I understand that if I am re-employed in a post covered by the Civil Service pension arrangements, I may have to pay back some or all of my compensation payment.

I understand that any overpayment of benefits may be recovered and that I am responsible for notifying the Scheme Administrator of any change of circumstances which might affect my entitlement.

I confirm that I am not currently employed in any other capacity by an employer covered by the Civil Service Pension arrangements at this time.

I undertake to notify the Scheme Administrator if I am re-employed by a Government Department, non-departmental public body or in any employment covered by the Civil Service pension arrangements.

If I become aware of any alteration to the information I have given in the tax section after it has been submitted to the Scheme Administrator, I agree to notify them of any alterations at the earliest opportunity.

**Signature**

**Date**

**Please make sure you have completed the relevant sections of the form and enclose the required documents listed below before returning this form. Additional guidance on how to complete the CDF form is available on the Civil Service Pensions website:**

**[www.civilservicepensionscheme.org.uk/](http://www.civilservicepensionscheme.org.uk/)**

- Complete the Personal Details section
- Sign and date the declaration
- Attach print outs or any electronic copies of calculations you have made for added pension

## Voluntary Deduction Societies – Organisations and Codes

Organisation	Website	Code
Aviva	<a href="http://www.aviva.co.uk">www.aviva.co.uk</a>	418
Benenden Healthcare Society Ltd	<a href="http://www.benenden.co.uk">www.benenden.co.uk</a>	402
BHCA – (inc Forrester Health)	<a href="http://www.bhca.org.uk">www.bhca.org.uk</a>	*
British Council Benevolent Fund	<a href="http://www.britishcouncil.org">www.britishcouncil.org</a>	466
British Council Retirement Association	<a href="http://www.britishcouncil.org">www.britishcouncil.org</a>	457
Crown Estate (Rent)	<a href="http://www.thecrownestate.co.uk">www.thecrownestate.co.uk</a>	440
CS Healthcare	<a href="http://www.cshealthcare.co.uk">www.cshealthcare.co.uk</a>	436
CSPA (Civil Service Pensioners Alliance)	<a href="http://www.cspa.co.uk">www.cspa.co.uk</a>	407
CSRF (Civil Service Retirement Fellowship)	<a href="http://www.csrf.org.uk">www.csrf.org.uk</a>	401
CSSC (Civil Service Sports Council)	<a href="http://www.cssc.co.uk">www.cssc.co.uk</a>	423
Engage Mutual	<a href="http://www.onefamily.com">www.onefamily.com</a>	434
Friends Provident	<a href="http://www.friendslife.com">www.friendslife.com</a>	418
HASSRA Lottery	<a href="http://www.hassra.org.uk">www.hassra.org.uk</a>	456
HASSRA Membership (Dept of Health Recreation Association)	<a href="http://www.hassra.org.uk">www.hassra.org.uk</a>	439
Hospital Saturday Fund (London Scheme only)	<a href="http://www.hospitalsaturdayfund.org">www.hospitalsaturdayfund.org</a>	416
PCS (Union)	<a href="http://www.pcs.org.uk">www.pcs.org.uk</a>	419
POIS (Post Office Insurance Society)	<a href="http://www.pois.co.uk">www.pois.co.uk</a>	414
PSCF (Prison Service Charity Fund)	<a href="http://www.prisonservicecharityfund.co.uk">www.prisonservicecharityfund.co.uk</a>	481
PSSA Lottery	<a href="http://www.pssa.org.uk">www.pssa.org.uk</a>	468
RCSL (Revenue & Customs Sports & Leisure)	<a href="http://www.rcsl.info">www.rcsl.info</a>	460
Simplyhealth (formerly HSA, Hospital Savings Association)	<a href="http://www.simplyhealth.co.uk">www.simplyhealth.co.uk</a>	406
Sun Life Assurance Society (AXA)	<a href="http://www.axa.co.uk">www.axa.co.uk</a>	462
The Charity for Civil Servants (formerly CS Benevolent Fund)	<a href="http://www.foryoubyyou.org.uk">www.foryoubyyou.org.uk</a>	405

**Please Note:** It is your responsibility to ensure that you have contacted the organisation you wish to contribute to so you can detail the correct level of deduction to be taken from your Civil Service Pension benefits. We have provided website details where applicable to assist you.

On receipt of your completed form, the Scheme Administrator will start your chosen deduction(s). Please note we will not be responsible for any incorrectly detailed deductions. If you are unsure as to what level of deduction you should be making, please contact the relevant society/organisation.

\* Different codes exist for BHCA, dependent on which policy type is being deducted for. We will require evidence for BHCA deductions.