



Civil Service Pensions

This is an ONLINE ONLY form.

Transitional Tax-Free Amount Certificate application form

Application in respect of a deceased scheme member

Deceased member's name

National Insurance number

Date of death

Address

Postcode

Legal personal representative's name

Legal personal representative's
address

Postcode

Please continue on Page 2.

Declaration

1. I wish to apply to Civil Service Pensions for a Transitional Tax-Free Amount Certificate in respect of the above-named, deceased member.
2. I have read the Transitional Tax-Free Amount Certificates Information Sheet and understand the information I must provide to the CSPS as part of my application.
3. I certify that the evidence I have submitted with this form constitutes 'complete evidence' of all of the above member's benefit crystallisation events and tax-free lump sums received between 6 April 2006 and 5 April 2024, and agree to Civil Service Pensions taking this evidence at face value.
4. To the best of my knowledge the above-named member did not have a Relevant Benefit Crystallisation Event at any time after 6 April 2024.
5. I understand there is a 90-day timescale for providing a response to my application.
6. If there are any errors in the evidence I have provided, it will change the figures detailed in the Transitional Tax-Free Amount Certificate and the certificate becomes invalid¹. I undertake to notify Civil Service Pensions if I become aware of any errors in this evidence or information which has not been taken into account when producing the certificate.

Your signature

Date

Please return your completed form to:

Civil Service Pensions, Capita Pension Solutions, PO Box 713, Darlington, DL1 9JZ.

¹ This includes any changes to the member's benefits under the Remedy exercise.