

Help using this Veterans UK PDF form

About this form

- **You must download and save this form to your computer before using it**
- You can save data typed into this PDF form if you use the latest version of **Adobe Acrobat Reader**
- To download the latest version of Adobe Acrobat Reader free of charge go to the Adobe website
- This means that you do not have to complete this form in one session

Helpful information for using this form

- Save the form to your computer
- After completion print the form
- Sign the form in black pen
- Post the form using the address given
- **If you have an enquiry for the Armed forces Pension Scheme, please call the JPAC Enquiry Centre on 0800 085 3600 or email DBS-PensionsHelp@dbspv.mod.uk**

The form will not save in

- older versions of Adobe Acrobat Reader
- other pdf readers, for example Preview on a Mac or Foxit on a PC

We have been made aware of issues when using Apple products such as Iphones and I pads to complete this form.

You may be unable to save or re-open it due to updates to Apple products since this form was created.

Work is being undertaken to transform our forms and systems but until this is complete, we ask that you find an alternative device, if possible, or print the form and complete it by hand.

Feedback

- We would like your feedback about this form. We will only use any comments to improve future versions
- Please email your comments to: DBS-OPPT@mod.gov.uk
- **Please do not send this form or any personal information to this email address. It is for feedback comments only**

PLEASE NOTE YOU MUST SIGN THIS FORM USING A BLACK PEN. WE CANNOT ACCEPT THIS FORM BY EMAIL

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CLAIM FOR PAYMENT OF PRESERVED PENSION BENEFITS

Please make sure you answer all the relevant questions and complete the form in block capitals
If you need help, contact JPAC on 0800 085 3600

This form should be completed and despatched to the address given on **Page 6**
(AFPS75 / FTRS97 / AFPS05 / RFPS05 / AFPS15) Immediately if permanently incapacitated.
(AFPS75 / FTRS97) 3 months before your 60th birthday or 3 months before your 65th birthday
(You can claim the element of pension due at 65 on an actuarially reduced basis at age 60).
(For FTRS you can claim deferred benefits due at age 65 on an actuarially reduced basis at any time between age 60 and age 65).
(AFPS05 / RFPS05) 3 months before your 65th birthday or from age 55 on an actuarially reduced basis.
(AFPS15) 3 months before reaching State Pension age or from age 55 onwards on an actuarially reduced basis.
AFPS 75 Applicants who have Military Service which spans 05 Apr 06, will have to submit two claims one at age 60 and another at age 65, to apply for that element of Pension due.

Part A – Your Details

Rank

First name

Surname

Service number

If you have changed your name since leaving service, please provide supporting documentation. For example, a copy of your marriage certificate/deed poll, showing your change of name. **Copies only, please do not send originals.**

Title (Mr, Mrs, Miss, Ms, Dr, Rev)

National insurance number

Date of Birth

Contact address. All communications will be sent to this address.

Address

Postcode

Part A – continued

Telephone number

Email address

Part B – Application for Pension Benefits

Please place a tick in the appropriate boxes below

My pension is subject to a Pension Sharing Order Yes No

AFPS75 / FTRS97 / NRPS / AFPS05 / RFPS05 / AFPS15

Early due to ill-health

Please ensure that you also complete the EPPP Annex B-C form, and submit this along with your AFPS Form 8.

AFPS75 / FTRS97 / NRPS

I wish to claim AFPS75 / FTRS97 / NRPS Pension/lump sum

Age 60 having completed reckonable service before 5 April 2006

Age 60 plus early payment of age 65 benefits actuarially reduced having served after 5 April 2006

Age 65 full entitlement having served after 5 April 2006

FTRS97 ONLY AGE 65 ELEMENT

I wish to claim an actuarially reduced pension from **(Date must between your 60th and 65th birthday)**

AFPS05 / RFPS05

I wish to claim my AFPS05 / RFPS05 Pension benefits/lump sum Age 65

I wish to claim an actuarially reduced pension from **(Date must between your 55th and 65th birthday)**

AFPS15

Age 65 full entitlement having served after 5 April 2006

I wish to claim AFPS15, benefits having reached State Pension Age

I wish to claim an actuarially reduced Pension from **(Date must between your 55th birthday and State Pension Age)**

To delay payment beyond State Pension Age until

To commute my pension to raise a lump sum as an amount £ or as a % (up to a maximum of 25%) £ %

Part C – Bank Account Details

Please indicate below how you would like your pension and any lump sum paid. I would like my Pension and any lump sum paid into my account.

UK Bank Account/Building Society

Overseas Bank Account (see note below)

Full name and address of Bank/Building Society

Postcode

Name(s) of account holder

Account number

Building Society roll number

Sort code

If you want to have your pensions and any lump sums paid into an overseas bank please go to:

<https://www.gov.uk/government/publications/overseas-pensions-payment-mandates>

where you will find copies of the relevant overseas payment mandate. On completion of the mandate, it must be sent to Veterans UK, Process Team MP 335, Kentigern House, 65 Brown Street, Glasgow G2 8EX

Payment Account Details

- We can make payments to overseas accounts but require you to print out and complete the relevant overseas payment mandate, please refer to note above
- We cannot make payments to a Post Office Account
- We cannot make payments to a third party; you must provide an account or joint account in your name

HM Revenue & Customs (HMRC) Required Information (Parts D-F)

As a result of legislation introduced by HM Revenue & Customs (HMRC) we require the details of other pension awards that you are in receipt of. This is specifically to assess the impact on your Lifetime Allowance (LTA) percentage. Under HMRC legislation we cannot process any payment of benefits if this information is not provided.

If you require more information about LTA, Primary or Fixed Protection please seek guidance from HMRC directly prior to completing and returning the form.

Part D - 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:

<https://www.gov.uk/hmrc-internal-manuals/pensions-tax-manual/ptm133810>

You can also call HMRC helpline on **0300 123 1079**. If you are calling from abroad telephone **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 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** currently in another pension arrangement, answer **no** to question (i) below and **go to Part E**.

Part D - continued

Please note:

Veterans UK has a legislative duty to record pension re-investment, inform HMRC of your investment intent and report breaches of the recycling rules.

Veterans UK 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 lump sum is less than £7,500, the pension recycling rule 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 E**.

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 E**.

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%

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|-------|--|-----|----|
| (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) | Is your pension lump sum less than £7,500? | Yes | No |
| (iii) | Does the amount you have invested/are investing exceed 30% of your retirement lump sum? | Yes | No |

Part E – Payment of Other Pension(s)

Do you have any other Pension(s) currently in payment or any that are due to be paid on or before your Armed Forces award date?	Yes	No
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If yes, please complete the details below. If no, go to **Part F**

Please fill in these boxes for any pensions put into payment **after 06 April 2006 only**

Name of pension scheme	Ref number	Date payment started or due to start	LTA percentage
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Please fill in these boxes for any pensions put into payment **before 06 April 2006 only**

Name of pension scheme	Ref number	Date payment started	Gross annual amount in payment
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Part F

I have obtained individual enhanced, Primary or Fixed Protection from HMRC	Yes	No
I have sent you a copy of the Protection Certificate	Yes	No

If you have not already done so, you must provide or attach a copy of the Protection Certificate quoting your service number.

Part G – Data Protection

How the MOD collects and uses personal information

The Ministry of Defence (MOD) is committed to protecting the privacy and security of your personal data and the [MOD Privacy notice](#) explains your rights and provides information that you are entitled to under UK data protection legislation. It is important that you read this notice, together with any other privacy notice that may be provided when we collect or process personal information about you so that you are aware of how and why we are using such information. The [MOD Personal information charter](#) contains the standards you can expect when we ask for, hold, or share your personal information and your rights under the law.

Part H – Declaration

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 MOD of anything that may affect my entitlement to, or the amount of, payment made under any scheme administered by Veterans UK, including any change of address.
- if I knowingly give false information, I may be liable to prosecution.

I agree

- to refund any sum paid as a result of this claim in the event that an overpayment is made for any reason

Remember – You must sign this form yourself if you can, even if someone else has filled it in for you. If a representative who acts as a Power of Attorney or Appointee for the claimant is signing this form, they must enclose evidence to show that they are the legal representative.

Part I – Consent for email correspondence

Veterans UK is happy to conduct correspondence with customers via a nominated email address if that is their preference. There are some types of personal information we would not be able to include in an email correspondence, which are listed below:

- I authorise Veterans UK of the MOD to use email whenever possible in its correspondence with me via my nominated email address shown on the front of this claim form. I accept that the information may include my personal details excluding bank account numbers, National Insurance number, medical details and any other information that could compromise my identity.
- I understand that correspondence transmitted by email may be open to abuse because it is transmitting over an unsecured network. I accept that the MOD will not be liable for any loss, interception or unauthorised use of information transmitted this way. I am content for Veterans UK to correspond with me from the email address shown at the front of this claim form.

Do you wish to correspond via email?	Yes	No
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Part J – Signatures of Applicant and Witness

Signature of Applicant

Date

Witness – I certify that the person named at Part A has signed this form in my presence

Title

Surname

First name

Address

Postcode

Signature of Witness

Date

Please send the completed form to:

Veterans UK
Process Team
MP335
Kentigern House
65 Brown Street
Glasgow
G2 8EX

Signature of Applicant and Witness

You must sign this form before submitting and ensure that it is witnessed.



Ministry
of Defence

Veterans UK
MP335
Kentigern House
65 Brown Street
Glasgow G2 8EX
Freephone: 0800 085 3600

With compliments

Your AFPS Form 8 dated / / has been received.

Name

Service number

Address

Postcode



CHECK OFF THE APPLICABLE ITEMS BELOW BEFORE SUBMITTING THIS

Change of name – I have enclosed evidence

Payment Account details – I have provided valid UK account details in my own name

Overseas Bank account – I have enclosed the relevant overseas mandate

I have signed the form and the witness details are completed and signed

**INCORRECT OR INCOMPLETE FORMS WILL BE REJECTED
AND WILL DELAY OUR ABILITY TO ASSESS YOUR CLAIM**