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 Ipads 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.

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

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Ministry of Defence

Armed Forces and Reserve Forces Pension Schemes

Armed Forces Pension Schemes Application Form

CLAIM FOR PAYMENT OF FORMER SPOUSE PENSION CREDIT

Please make sure you answer all the relevant questions.
If you need help contact JPAC on 0800 085 3600

This form should be completed and despatched to the address given on **Page 7**.
Your pension credit benefits are due for payment when you reach the statutory minimum age of 65, or, if you so wish, from age 55 onwards on an actuarially reduced basis.
To ensure prompt payment, you must raise your claim 3 months prior to the date on which payment is due.
Please complete in block capitals.

Part A – Your Details

First Name

Surname

National Insurance Number

Service number

Date of Birth

Address

Postcode

Telephone Number

Email Address

Part B – Application for Pension Credit

Armed Forces Pension Scheme 1975 / Full Time Reserve Pension Scheme 1997 / Non Regular Permanent Staff Pension Scheme

I wish to claim my Pension Credit and any lump sums ☐ Age 60/65

I wish to claim an actuarially reduced Pension Credit from ☐ ☐
(Date given must be between your 55th and 60/65th Birthday).

(If no date is provided then claim date will be age 55 or date of receipt of application)

Armed Forces Pension Scheme 2005 / Reserved Forces Pension Scheme 2005

I wish to claim my Pension Credit and any lump sums ☐ Age 65

I wish to claim an actuarially reduced Pension Credit from ☐ ☐
(Date given must be between your 55th and 65th Birthday).

(If no date is provided then claim date will be age 55 or date of receipt of application)

Armed Forces Pension Scheme 2015

I wish to claim my Pension Credit having reached State Pension Age ☐

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

(If no date is provided then claim date will be age 55 or date of receipt of application)

I wish to delay my Pension Credit beyond State Pension Age until ☐

☐

% ☐

Important Information
If the wrong Pension Credit option is made at Part B, the form may have to be returned to you. If you are unsure of the correct option to choose, contact the JPAC EC on 0800 085 3600 prior to submitting the form.

Part C - Bank Account Details

I would like my Pension and any lump sums paid into this account.

Please complete the details below.

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, Pension Team, MP 480, Kentigern House, 65 Brown St, Glasgow, G2 8EX

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 Her Majesty's Revenue and Customs (HMRC) helpline on **0300 123 1079.**

Alternatively 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 of 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** at this time in another pension arrangement, answer **no** to question **(i)** below and **go to Part E**.

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%

(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 – Details of Other Pension Entitlements

Do you currently have any other pension(s) in payment or have any pensions that are due to be paid in the future? ☐ Yes ☐ No

If yes, please give details of your additional pension(s) below. If no, go to **Part F**

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

Name of pension scheme	Ref number	Date payment started or date payment due to start	LTA percentage	Gross annual pension amount

Please fill in these boxes for any pensions put into payment **before 06 Apr 2006 only**

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

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 this 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

Part J – Signatures of Applicant and Witness

Signature of Applicant

Please sign form in black pen after printing

Date

Witness - **I** certify that the person named at **Part A**, has signed this form in my presence.

Title

Address

Surname

First name

Postcode

Signature of Witness

Please sign form in black pen after printing

Date

Please send the completed form to:
Veterans UK, Pension Team, MP 480, Kentigern House, 65 Brown St, Glasgow, G2 8EX

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Part K – Acknowledgement

Ministry of Defence

With compliments

Your AFPS Form 8A dated / / has been received.

Veterans UK
MP 480
Kentigern House
65 Brown Street
Glasgow G2 8EX
Freephone: 0800 085 3600

Name:

Address:

Postcode

Service number