

SUBJECT:**ESTIMATES OF PENSION BENEFITS****CIRCULAR NUMBER:**

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TARGET AUDIENCE:

Education and Library Boards
Council for Catholic Maintained Schools
Boards of Governors of Grant-Aided
Schools and Governing Bodies of
Institutions of Further Education

SUMMARY OF CONTENTS:

This Circular advises of the procedures for requesting estimates of pension benefits.

ENQUIRIES:

Any enquiries about the contents of this Circular should be addressed to:

Mrs E Large
Department of Education
Teachers' Superannuation Branch
Waterside House
75 Duke Street
LONDONDERRY
BT47 6FP

STATUS OF CONTENTS:

Advice

RELATED DOCUMENTS:

None

SUPERSEDED DOCUMENTS:**EXPIRY DATE:**

Not applicable

DENI WEBSITE:<http://www.deni.gov.uk>**TEL:** 028 71 319000**FAX:** 028 71 319190

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To: Education and Library Boards
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Boards of Governors of Grant-Aided
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ESTIMATES OF PENSION BENEFITS

It has been noted over a period of time that employers have been requesting Teachers' Superannuation Branch to calculate repeat estimates of pension benefits for the same member. This has usually happened where premature retirement was being considered. As you will appreciate this diverts staff from the calculation and payment of pension benefits.

While there is no statutory obligation on occupational pension schemes to issue more than one estimate of retirement benefits in any 12 month period, Superannuation Branch will process requests for estimates as normal but employers are asked to refrain from requesting estimates of pension benefits if an estimate has been provided within the previous 12 months. Similarly, employers should not request several estimates of benefits payable in the event of various retirement dates or in the event of differing amounts of compensation service being awarded. Where such a request is received, a copy of any previous estimate will issue, or a single estimate will be provided based on one scenario.

The problem presented to Superannuation Branch by the number of requests for estimates has been aggravated by the timing of those requests and the response times demanded. Sometimes faxed requests for estimates have been received in mid-afternoon with a faxed reply required for later that afternoon. This is clearly unacceptable and employers are asked to ensure in future that at least 10 working days are allowed for issue of an estimate.

In the case of employees not paid directly by Teachers' Salaries Branch, it is important that the request for an estimate is accompanied by details of salary in payment over the preceding 3 years with the effective dates of salary change. Details of unpaid days during those same 3 years are also required.

If you wish your request for an estimate to remain confidential, this should be clearly stated at the time.

Any enquiries about the contents of this Circular should be made in writing to Teachers' Superannuation Branch, Department of Education, Waterside House, 75 Duke Street, Londonderry, BT47 6FP or by telephoning 028 71 319162/3.

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