

## Nomination of Partner

### Purpose

You may nominate your partner to receive a pension from the Northern Ireland Teachers' Pension Scheme after your death provided certain conditions are met.

Please complete in **CAPITAL** letters

### **PART A - To be completed by the applicant in all cases**

#### Section 1 – Particulars of Applicant

1. Surname: \_\_\_\_\_ 2. TR No: \_\_\_\_\_
3. Forenames: \_\_\_\_\_
4. Address: \_\_\_\_\_  
\_\_\_\_\_ Postcode: \_\_\_\_\_
5. Date of Birth: \_\_\_\_\_
6. E-mail address: \_\_\_\_\_
7. Home Tel. No: \_\_\_\_\_ 8. Mobile No: \_\_\_\_\_
9. Name and address of school or Establishment in which employed:  
\_\_\_\_\_  
\_\_\_\_\_
10. Previous pensionable teaching service in England/Wales or Scotland before 1 April 1972 or before subsequent entry into reckonable service in Northern Ireland.

Employing Body	Dates of Employment		Reference No in England and Wales or Scotland	Uncovered pensionable service in England/Wales or Scotland for which cover is now sought
	From	To		

#### Section 2 – Nomination of Dependant

1. Full Name of Dependant: \_\_\_\_\_ 2. Date of Birth: \_\_\_\_\_
3. Address: \_\_\_\_\_  
\_\_\_\_\_ Postcode: \_\_\_\_\_
4. Relationship to Teacher: \_\_\_\_\_
5. Gross Income of Nominee £
  - (a) State Pension
  - (b) Invalidity Allowance
  - (c) Occupational Retirement Pension
  - (d) Other Source

**TOTAL YEARLY INCOME** \_\_\_\_\_
6. Weekly Amount of Your Contributions to Nominee: \_\_\_\_\_  
£ \_\_\_\_\_

**Section 3 should be completed only where it is desired to pay additional contributions to buy-in reckonable service prior to 1 April 1972.**

**An estimate of the costs involved can be obtained by contacting Teachers' Pensions Branch**

**Section 3 – Election to Purchase Reckonable Service Before 1 April 1972.**

**1. Service Option**

Please indicate by placing a tick in the appropriate box, the amount of service to be covered by the payment of additional contributions.

a. **All** previous service

b. 5 years of previous service

c. more than 5 years but not all previous service

If Option C has been chosen, please indicate in the box opposite, the number of complete years to be covered by additional contributions

**2. Additional Contributions**

Please indicate the percentage of salary chosen to pay additional contributions by placing a tick against the appropriate number in the box below. (The estimated cost should be obtained from Teachers' Pensions Branch).

1%	2%	3%	4%	5%	6%	7%	8%	9%

**Section 4 – Declaration for election to Purchase Reckonable Service Before 1 April 1972.**

To be completed by the applicant

- I declare that the information given by me on this form is correct to the best of my knowledge.
- I elect to pay additional contributions for my previous service as indicated in Section 3 above
- I understand that the election to pay for previous service is irrevocable.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **PART B – Declaration by Scheme member and partner**

### **Section 5 – Declaration for Nomination of Partner**

I confirm the following:

- + We have lived together for  years, during which time our financial affairs have been interdependent (or) the partner has been financially dependent on the Scheme member);
- + We have a committed relationship with each other and we intend to continue this indefinitely;
- + We are mutually responsible for each other's welfare;
- + We are not related in a way that will prevent either marriage or civil partnership;
- + Neither of us is married to or in a civil partnership with anyone else;
- + Neither of us is currently nominated as the partner of anyone else;
- + We will inform TPB if our relationship comes to an end;
- + We understand that benefits will not be paid unless the partner provides satisfactory evidence that the declaration above is valid when the scheme member dies; and
- + We have read the accompanying notes

**Member's signature**

**Signed:**

**Date**

**Partner's signature**

**Signed:**

**Date**

**Now please return the completed form direct to:**

**Department of Education, Teachers' Pensions Branch,  
Waterside House, 75 Duke Street, Londonderry, BT47 6FP  
Tel: 028 7131 9000 Fax: 028 7131 9190**



# Notes for Nomination of Partner

(PLEASE DETACH AND RETAIN)

You may nominate your partner to receive a pension from the Northern Ireland Teachers' Pension Scheme after your death provided certain conditions are met. To nominate your partner you must complete the attached form and send it to Teachers' Pensions Branch (TPB).

You should be aware that after your death, your partner will need to provide information to TPB to support his or her claim to a partner's pension. For a nomination to be accepted the conditions to be met are: you and your partner have been living together in an exclusive committed long-term relationship for 2 years; you and your partner are free to marry or, to enter a civil partnership; and either your partner is financially dependent on you or the two of you are financially interdependent. Neither you or your partner can be married to, or in a civil partnership with, anyone else. Overleaf is a list of relationships which are too close to allow a marriage or civil partnership.

Financially interdependent means that you rely on your joint finances to support your standard of living. It does not mean that you need to be contributing equally. Evidence of financial interdependency might include confirmation: that you lived in a shared household; shared household spending; shared bank accounts or investments; a loan or mortgage in joint names; wills naming each other as the main beneficiary; a mutual power of attorney; and your partner being nominated as the main beneficiary of life assurance.

If your relationship comes to an end, it is important that you tell TPB as soon as possible so that they can cancel your declaration. If you enter into a new permanent relationship, you may want to make a new declaration at some time in the future.

TPB will pay a pension to a surviving partner provided that you have two years in the scheme from 1 April 2007. You can purchase previous teaching, which will count for qualifying purposes.

Further information is available on the TPB website, [www.deni.gov.uk](http://www.deni.gov.uk).

Your partner will receive their pension for the rest of their life, even if they enter into a new relationship after you die. Their pension will be paid each month and it will be increased every April to reflect increases in the cost of living. As well as a pension for your partner the NITPS will pay a pension to your children if they are under 17 or, if still in full-time education or training and under 23.

NITPS will also pay a lump sum death grant if you die before you retire. You can nominate whoever you like to receive the death grant.

If you die while you are still contributing to the scheme, TPB will usually add on some extra years of service (we call this a 'service enhancement') when calculating your partner's pension. If you die after retirement or after leaving the scheme, your partner's pension will be worked out in the same way, but there will be no service enhancement.

When you die your partner should notify TPB. Your partner will have to complete a claim form and provide information to support his or her claim to a partner's pension. Your partner will be asked to supply information that is appropriate at the time of your death rather than at the date of your declaration. TPB need to be satisfied that you continue to meet the conditions for nominated partners. At the time of your death, you and your partner should be living together in an exclusive committed long-term relationship; free to marry or enter a civil partnership; and financially interdependent or your partner was financially dependent on you. If your circumstances force you to spend your final years away from home, for example, in residential nursing care, the scheme administrator will take account of your situation when you were living at home as well as at the time of your death.

## **Guide to relationships that are not allowed to marry in the UK**

**Note:** This list is based on the statutory list in the Marriage Act 1949, (section 1, Schedule 1) and the Civil Partnership Act 2004 (Schedule 1) and apply to Northern Ireland. The statutory list may change so the following list is only a guide.

### **A man may not marry his:**

- + mother, adoptive mother, former adoptive mother;
- + daughter, adoptive daughter, former adoptive daughter;
- + grandmother;
- + granddaughter;
- + sister/half-sister;
- + aunt; or
- + niece.

### **A man may not enter into a civil partnership with his:**

- + father, adoptive father, former adoptive father;
- + son, adoptive son, former adoptive son;
- + grandfather;
- + grandson;
- + brother/half brother;
- + uncle; or
- + nephew.

### **A woman may not marry her:**

- + father, adoptive father, former adoptive father;
- + son, adoptive son, former adoptive son;
- + grandfather;
- + grandson;
- + brother/half-brother;
- + uncle; or
- + nephew.

### **A woman may not enter into a civil partnership with her:**

- + mother, adoptive mother, former adoptive mother;
- + daughter, adoptive daughter, former adoptive daughter;
- + grandmother;
- + granddaughter;
- + sister/half-sister;
- + aunt; or
- + niece.