BOC Pension Scheme.

Lead**Ing.**



Declaration of retirement benefits

This form should **only** be completed if you have a pension (or pensions) already in payment (or coming into payment on the **same** date as a pension from the BOC Pension Scheme).

Important note: State pensions, spouse/dependant's benefits, benefits from unregistered arrangements and any benefits you are taking **after** the date of retirement from the BOC Pension Scheme should not be included on this form.

Please complete all relevant sections in block capitals, sign and date the form and return it to:

BOC Pension Services
The Priestley Centre
10 Priestley Road
The Surrey Research Park
Guildford
Surrey GU2 7XY



Purpose of this form

Before benefits are paid from a registered pension arrangement, the scheme administrator must establish whether the payment of benefits will give rise to a tax charge. This charge applies where a member's benefits from all sources exceed the lifetime allowance (LTA).

Although most members' benefits will not exceed the LTA, HM Revenue & Customs (HMRC) requires **all** members to provide details of how much of the LTA (if any) has been used up before the pension can start to be paid.

If you do not provide this information, the scheme administrator is legally obliged to assume you have used up all of the LTA and will have to apply the tax charge (effectively 55% for a higher-rate tax payer) to your entire pension.

General Data Protection Regulation (GDPR)

By completing this form, I consent to my personal information (including any sensitive personal information) being held and processed by the Trustee, BOC Pension Services and any third party appointed for the effective running of the Scheme. I understand that the Trustee and BOC Pension Services, and any third parties to whom they make the data available, will comply with the underlying principles of applicable data protection legislation, including the General Data Protection Regulation (EU) 2016/679.

If you want to know more about the data held which relates to you or the purposes for which it may be used, please refer to the data privacy statement provided separately to you, or alternatively please contact BOC Pension Services.

The Trustee may send you information about the Scheme to your work email address. If you leave employment, information may be sent to a different email address if you have provided one.

Section 1: Personal details									
Full name:									
National Insurance nur	nber:								

Section 2: Members who have registered with HMRC

You should only complete this section (and return the requested information) if you registered with HMRC for:

- protection because your benefits exceeded or were close to exceeding the LTA at 6 April 2006 or 6 April 2012; or
- the non-residence LTA factor (only available if you worked abroad for a period whilst being retained within a UK pension scheme).

(Tick box)

I have enclosed a copy of the certificate(s) provided by HMRC confirming my entitlement following registration.

Section 3: Details of your pension benefits										
Name of previous pension arrangement:										
	(DD	/	MM	/	YYYY)				
Date pension started:		/		/		Tax-free cash taken:	£:			
Percentage of LTA used:				0/0*	OR Curr	ent value of pension in payment:	£:	a year		
If you are taking the benefit declared above on the same date you are taking benefits from								(Delete as appropriate)		
						on Services should notionally r the benefit from the Scheme.		Before/After		
Name of previous pension	n arrangi	ement:								
	(DD	/	MM	/	YYYY)				
Date pension started:		/		/		Tax-free cash taken:	£:			
Percentage of LTA used:				0/0*	OR Curr	ent value of pension in payment:	£:	a year		
If you are taking the benefit declared above on the same date you are taking benefits from								(Delete as appropriate)		
						on Services should notionally r the benefit from the Scheme.		Before/After		
Name of previous pension	n arrang	ement:								
	(DD	/	MM	/	YYYY)				
Date pension started:		/		/		Tax-free cash taken:	£:			
Percentage of LTA used:				0/0*	OR Curr	ent value of pension in payment:	£:	a year		
If you are taking the benefit declared above on the same date you are taking benefits from								(Delete as appropriate)		
				ether BOC Pension Services should notionally displayed before or after the benefit from the Scheme.				Before/After		
* Your pension provider should confirm this figure.										

Section 5: Declaration I confirm that the details provided are correct to the best of my knowledge and belief. Date: / / /	(DD	/	MM	/	YYYY)	Amount transferred									
I confirm that the details provided are correct to the best of my knowledge and belief. (DD / MM / YYYY)			/		/			£:									
I confirm that the details provided are correct to the best of my knowledge and belief. (DD / MM / YYYY)																	
(DD / MM / YYYY)	Section 5: Declaration																
Signed: Date: / /	I confirm that the details provided are correct to the best of my knowledge an								e and belief.	(DD	/	MM	/	YYYY)	
	Sig	ned:								Date:			/		/		

You should only complete this section if an overseas transfer out has been made (or is due to be made) on your behalf on or after 6 April 2006 and before your retirement date from the BOC Pension Scheme.

Section 4: Overseas transfers out on or after 6 April 2006

Contact details

BOC Pension Services, The Priestley Centre, 10 Priestley Road, The Surrey Research Park, Guildford, Surrey GU2 7XY

• **Helpline:** 0800 096 3214 (BOC TEL 750 4745)

• Fax: 01483 244 739

• **Email:** pensions.uk@boc.com



www.bocpensions.co.uk