

BOC Pension Scheme

Declaration of retirement benefits form



You should only complete this form if you are already receiving a pension (or pensions), or you have one that is due to start being paid on the same date as a pension from the BOC Pension Scheme (the Scheme).

Important note: You should not include state pensions, spouse/dependant's benefits, benefits from unregistered arrangements and any benefits you are taking after your date of retirement from the Scheme on this form.



Please complete all relevant sections in BLOCK CAPITALS, sign and date the form, and return it to:
BOC Pension Services, Forge, 43 Church Street West, Woking, Surrey, GU21 6HT

Purpose of this form

- Before benefits are paid from a registered pension arrangement, the scheme administrator must establish whether the paying of your benefits would give rise to a tax charge. This would apply if your 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 before we can start paying your pension.
- If you do not provide this information, we are legally obliged to assume you have used all of your LTA and will have to apply the LTA tax charge to your entire pension.

To find the latest LTA, visit www.gov.uk/tax-on-your-private-pension

Section 1: Your personal details

Full name:

National Insurance number:

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 if your benefits were close to exceeding the LTA, or for the non-residence LTA factor (only available if you worked abroad for a period while being retained within a UK pension scheme).

You can check your existing protection on the Government's website at gov.uk/guidance/pension-schemes-protect-your-lifetime-allowance

(Tick box)

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

Section 3: Details of your other pension benefits

Name of previous pension arrangement:

Date pension started:

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Tax-free cash taken:

£

Percentage of LTA used:

%*

OR Current value of pension in payment:

£ a year

(Delete as appropriate)

If you're taking this benefit on the **same** date as your Scheme benefits, please let us know if we should notionally treat it as being paid before or after your Scheme benefits.

Before / After

Name of previous pension arrangement:

Date pension started:

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Tax-free cash taken:

£

Percentage of LTA used:

%*

OR Current value of pension in payment:

£ a year

(Delete as appropriate)

If you're taking this benefit on the **same** date as your Scheme benefits, please let us know if we should notionally treat it as being paid before or after your Scheme benefits.

Before / After

* Your pension provider(s) should confirm this figure.

Important note: If you need more space, please supply details of additional arrangements on a separate piece of paper.

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

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 Scheme.

Amount transferred

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

£

Section 5: Declaration

I confirm that the details provided are correct to the best of my knowledge and belief.

Signed:

Date:

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

UK General Data Protection Regulation (UK GDPR)

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 the UK GDPR.

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. If you have not yet provided us with a personal email address, please do so by contacting us using the details above. It's important that all your contact details are up to date so we can keep sending information about your benefits to you.

If you want to know more about the data held which relates to you, or the purposes for which it may be used, please visit www.bocpensions.co.uk/privacy or contact BOC Pension Services.

Legal note

The Trustee is not liable for any penalties arising as a result of any inaccurate information provided on this form, or any failure to provide relevant information.

The best place to find information on your pension is www.bocpensions.co.uk
However, if you cannot find what you are looking for there, you can contact us on pension.uk@boc.com

