

BOC Pension Scheme

Deferred Benefit Claim form



This form is for letting BOC Pension Services know what you would like to do with your deferred benefits in the BOC Pension Scheme (the Scheme). Your dependants can also use it to claim any benefits payable if you die before you take your Scheme benefits.



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

Section 1: Personal details of the deferred member

Surname:

Title (e.g. Mr, Mrs, Dr):

Forename(s):

Marital status:

National Insurance number:

Date of birth:

Personal email address:

Contact number:

Address & Postcode:

Section 2: Transferring benefits

I am considering transferring my benefits to the pension arrangement named below. Please send transfer details to:

Me (details as above)

My new pension arrangement
(please provide details below)

My financial adviser (please
provide details below)

Name of new pension arrangement/financial adviser:

Contact name or reference:

Daytime telephone number:

Address & Postcode:

Section 3: Retiring before Normal Retirement Age

I wish to apply for my benefits before Normal Retirement Age on the grounds of **(tick one box only)**:

Early retirement (I am age 55 or over): Ill-health retirement (you will be asked to provide satisfactory medical evidence):

Section 4: Death of member before Normal Retirement Age (please also complete section 1.)

The member died on: Name of next of kin:

Relationship of the next of kin to deceased member:

Address & Postcode:

Section 5: Declaration

I declare that the information provided is true to the best of my knowledge. I also consent to the information provided on this form being held and processed by the BOC Pension Scheme Trustee for the purposes of the UK General Data Protection Regulation (UK GDPR).

Signature of person completing the form: Date:

Relationship to member (if not the member):

Daytime telephone number of person completing this form:

Email address of person completing this form:

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 below. 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 using the details below.

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 about 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

