

AW6 (Transitional)

Surname:

SB No:

Other names

HM REVENUE AND CUSTOMS (HMRC) INFORMATION

To comply with HMRC legislation please read the guidance notes issued with this form and then answer the following questions:

1. Have you any retirement arrangements outside the HPSS Superannuation Scheme, whether in payment or not. This includes money purchase AVCs, but excludes the State retirement pension?
Yes please continue
No go to question 4
2. Will your annual pension from **all** your pension arrangements, including the HPSS Scheme, be more than £50,000 per year?
Yes please continue
Don't know please continue
No go to question 4
3. What percentage of the standard lifetime allowance (LTA) will have been used prior to your HPSS Superannuation Scheme benefits being taken?
 % go to question 4
Don't know please continue

If you are unable to provide us with the percentage of the LTA used prior to your HPSS Superannuation Scheme benefits being taken we will only be able to process your application if we treat your HPSS Superannuation Scheme benefits as entirely in excess of the LTA. **This will mean the scheme paying 55% of your lump sum and 25% of your pension directly to HMRC.**

If you would like us to do this, please tick this box.

Alternatively please wait until you know what percentage of the LTA has been used before returning this form. You may need to contact the Scheme Administrator of your other pension arrangements for this.

4. Have you any valid certificates from HMRC that either enhance your LTA or provide you with enhanced protection?
Yes please give details below
No

Certificate Number	Enhancement type	Enhancement factor	Protected lump sum value (£)

Valid enhanced protection certificate number

DECLARATION. TO BE SIGNED AND DATED BY ALL APPLICANTS.

- **I declare** that I am retiring from HPSS employment
- I have read the guidance notes issued with this declaration.
- I understand that, if I have chosen to retire early or I am retiring on normal age grounds, my pension **MAY BE SUSPENDED** if I return to HPSS employment within **one month**. Work in the HPSS totaling 16 hours or less a week is ignored for this purpose.
- I understand that, if I have chosen to retire, (except Voluntary Early Retirement (VER) 'not agreed') and return to HPSS employment before age 60, my pension and 're-employed' earnings combined, cannot exceed my earnings prior to retirement. If they do, I understand that I will have to pay back any overpayment of pension.
- **I declare** that the information I have given is correct and complete to the best of my knowledge and belief. If I become aware of any change in the information given on the form, or any further new information relevant to the form, after I have sent it I hereby agree to notify HPSS Superannuation Branch of those changes and that further or new information at the earliest possible opportunity.
- **I apply** for my benefits from the HPSS Superannuation Scheme.

Please sign here

Date