

# ER1 Benefit Estimate Request Form

This form is to be completed when you are requesting an estimate of pension benefits. Some estimates will carry a charge and information on charges can be found on the Schedule of Charges for Pension Benefits Estimates available on the forms and guides pages of our website [www.pspa.im](http://www.pspa.im)

## Part 1 – Personal Details

PSPA or scheme reference number

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

Surname

Forenames

Contact telephone number

National Insurance Number

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Address to send estimate to:


OR EMAIL Address to send estimate to:

## Part 2 – Declaration

- I have read the Schedule of Charges Fact Sheet provided on the website and
- I would like the PSPA to provide the following pension benefits estimates (please tick estimate required):

Tick <input type="checkbox"/> Estimate Required	Estimate Type	Calculated To Date or Age	Charge (inclusive of VAT)
<input type="checkbox"/>	Annual Benefit Statement	Please, provide me with a copy of my latest annual benefit statement.	None
<input type="checkbox"/>	Confirmed Retirement Estimate	I will be retiring and my employer has confirmed the last day of paid employment will be _____. Please, provide me with a pension estimate to this date.	None
<input type="checkbox"/>	Deferred Retirement Estimate	I will be claiming my pension my pension from the date _____. Please, provide me with a pension estimate to this date.	None
<input type="checkbox"/>	Ill Health	Please, provide me with an estimate of pension benefits when I retire on grounds on ill health. A claim form has been accepted and I am due to retire on _____.	None
<input type="checkbox"/>	Redundancy/VRS or MARS Retirement Estimate	I am considering my employers offer of redundancy. Please, provide me with an estimate assuming a last day of service of _____.	None
<input type="checkbox"/>	At current or a future date or age	Please, provide me with a pension benefits estimate to (insert date or age) _____.	£70 per age/date specified

	Hypothetical Quote at current or future date or age	Please provide me with a pension benefits estimate to (insert date or age) _____ Please base the estimate on a Final Pensionable Pay of £ _____ per annum and /or Total Pensionable Service of _____ years and _____ days	£70 per age/date specified
	Ill Health	Please provide me with an estimate of pension benefits if I were to retire on grounds of ill health on _____ . A claim has not yet been accepted.	£70 per age/date specified
	Life Assurance Lump Sum	An estimate of the lump sum payable upon death before retirement.	£70 per age/date specified
	Death Benefits	An estimate of surviving dependants benefits payable upon death before retirement.	£70 per age/date specified

All charges include VAT at standard rate of 20%

I have referred to the Schedule of Charges and I agree to pay the charges of £ \_\_\_\_\_ and enclose a cheque for the full amount. (Cheques made payable to the Isle of Man Government)/ I will pay the full amount by credit/debit card\*. I consent to the disclosure of information on this form for the purposes of verification and in compliance with the Data Protection Act. I understand that the PSPA will retain this form for their records.

\*Delete as appropriate

<b>Signature</b>	
<b>Print your name</b>	
<b>Date</b>	

### Please return to

Public Sector Pensions Authority, 3rd Floor, Prospect House, 27-29 Prospect Hill, Douglas, ISLE OF MAN, IM11ET or if no payment is due email to [pensions@pspa.im](mailto:pensions@pspa.im). To pay by credit/debit card you can either call into the office at the address noted above, or alternatively, call 01624 685598.

### Important Information

1. The costs quoted are for a single estimate.
2. If you require more than one estimate, then please complete a form and send a payment for each estimate request.
3. Estimates at multiple ages or dates will each be charged individually.
4. We will require full upfront payment by cheque made payable to the Isle of Man Government or by credit/debit card before we start processing chargeable requests.
5. Please specify any ages in years and months.
6. With the exception of hypothetical estimates, all estimates for active members will be based upon pensionable pay and pensionable service as at the last 31 March.
7. If a request is made by a member who is retiring and has confirmed his or her resignation with their employer, an estimate of benefits will be provided free of charge.
8. If a request is made by a member, who has been asked by their employer to consider voluntary or compulsory redundancy, VRS or MARS an estimate of benefits will be provided free of charge.

**Data Protection Act 2018** Fair Processing Notice: The Public Sector Pensions Authority (PSPA) will only use the information that you have provided on this form as required by law. Please refer to the PSPA's Privacy Policy on the website at [www.pspa.im](http://www.pspa.im) for more information.