

## Public Sector Pensions Authority

# PSPA4 Retirement Benefit Estimate Request

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 resources pages of our website [www.pspa.im](http://www.pspa.im).

### Part 1 – About Yourself

PSPA Scheme Reference Number

Title

Address

Full Name

Contact Number

National Insurance Number

Email Address

### Part 2 – Estimate Type

Please select the type of retirement benefits estimate you would like the PSPA to provide to you.

**Date or Age I would like to/I am expecting to retire from**

#### Confirmed Retirement/Claim Dates:

Estimate Required	Type	Calculate to date/age	Charge (VAT included)
	Annual Benefit Statement	Please provide me with a copy of my latest annual benefit statement.	None
	Confirmed Retirement	I will be retiring and my employer has confirmed my last day of paid employment as above. Please provide me with a pension estimate to this date.	None
	Deferred Retirement	I will be claiming my pension from the above date. Please provide me with a pension estimate to this date.	None
	Confirmed Ill Health	Please provide me with an estimate of pension benefits when I retire from ill health. <b>A claim form has been accepted</b> and I am due to retire on the above date.	None

**How we use your information:** The PSPA will use the information that you have provided on this form for administering your scheme membership and processing the payment of your pension benefits. We may share your information to administer and pay your pension, enable us to prevent and detect fraud and mistakes, or as required by law. For more information about with whom we share your information and how long we keep your personal data and your rights, please refer to our Privacy Notice on our website at [www.pspa.im](http://www.pspa.im)

**Unconfirmed Retirement/Claim Dates:**

At current or future date/age	Please provide me with a pension benefit estimate based to the above date/age.	£70 per date/age specified
Hypothetical	Please provide me with an estimate to the above date/age. Please base this on a final pensionable pay of £ _____ per annum and/or total pensionable service of _____ years and _____ days.	£70 per date/age specified
Unconfirmed Ill Health	Please provide me with an estimate if I were to retire from ill health on the above date. <b>A claim form has not yet been accepted.</b>	£70 per date/age specified

All charges include VAT at a 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 (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

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**Signature**

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**Print Full Name**

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**Date**

**Please return to:** PSPA, 3<sup>rd</sup> Floor, Prospect House, 27-29 Prospect Hill, Douglas, ISLE OF MAN, IM1 1ET, 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 above address, 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.