

Public Sector Pensions Authority
TC2 Unmarried Partner Nomination Form
 Teachers' Superannuation Order 2011 (the Scheme)

Complete this form to nominate your partner as a surviving adult dependant for the survivor's pension payable as part of your Unified Scheme death benefits. If you wish to nominate a death lump sum beneficiary, please complete our TC1 Lump Sum Nomination Form, which is available on our website, www.pspa.im. We recommend reading the attached guidance notes prior to completing this form. You may wish to keep a copy of this form in a safe place for future reference, in the event of your death.

Please complete in black ink using BLOCK CAPITALS.

Section 1 – About Yourself

To be completed by the member applicant in all cases.

Title (Mr/Mrs/Miss/Ms/Etc)	
Full Name	
Address	
Member Number (if known)	
Date of Birth	

Section 2 – Your Partner's Details

I hereby nominate my partner to receive any death benefit payable under the Scheme.

Title (Mr/Mrs/Miss/Ms/Etc)	
Full Name	
Address	
Member Number (if known)	
Date of Birth	

Section 3 – Declaration

By completing this form, we declare that:

- » We have lived together for _____ years **(please complete)** during which time our financial affairs have been interdependent, or one partner has been financially dependent on the other;
- » We have a committed relationship with each other and we intend to continue this indefinitely;
- » We are mutually responsible for each other’s welfare;
- » We are not related in a way that would prevent either marriage or a civil partnership;
- » Neither of us is married to or in a civil partnership with anyone else;
- » Neither of us is currently nominated as a partner of anyone else;
- » We will inform Isle Of Man Public Sector Pensions Authority if our relationship comes to an end;
- » We understand that benefits will not be paid unless the partner provides satisfactory evidence that the declarations above are valid when the member dies; and
- » We have read the accompanying notes.
- » We 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.

Member Signature	
I hereby revoke any previous nominations made.	
Date	

Partner’s Signature	
Date	

Section 4 – Witness Declaration

A witness must be a bank official, civil or public servant, doctor, solicitor, educator or otherwise member of the community of a professional standing. By signing below, the witness confirms they are not a relative or nominee and were present at the time the member and partner signed above and understands the PSPA will retain this form for their records.

I certify that this declaration was signed on this day, in my presence, by the person who I believe to be the applicant.

Title (Mr/Mrs/Miss/Ms)	
Full Name	
Address	
Occupation	
Witness Signature	
Date	

When completed, please return the application form to:

Public Sector Pensions Authority, 3rd Floor Prospect House, 27-29 Prospect Hill, Douglas, Isle of Man, IM1 1ET

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 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 whom we share your information with and how long we keep your personal data and your rights, please refer to our Privacy Notice on our website at www.pspa.im

Where can I find more information?

You can find more information using the resources on our website at www.pspa.im

Office Use Only

Received On	Updated By

Unmarried Partner Nomination Form – Guidance Notes for Members

Nominating a Partner as a Surviving Adult Dependant

Under the rules of the Teachers' Superannuation Order 2011 (the Scheme), a survivor pension will be paid to your partner when you die. Your survivor pension can be paid to your spouse, civil partner or nominated partner and you should use this form to nominate your partner.

If you have a spouse or registered civil partner, you do not need to nominate them to receive a pension after you die because they are automatically covered by the Scheme's survivor benefits.

What do I need to do?

If you are a member of the Scheme, you can nominate a surviving adult dependant partner to receive a survivor pension for life when you die. To do this please:

- » Complete Sections 1 to 4 of this form.
- » Ensure that both you and your nominated partner sign the declaration in Section 3.
- » Ensure that a witness has signed the declaration in Section 4.
- » Return your form to the address shown. We will send a copy of the form back to you.

Please read these notes before completing all sections of the partner nomination form, then keep them in a safe place for future reference.

Eligibility Criteria

For a nomination to be accepted, certain conditions must be met. This includes the following:

- » You must have pensionable teacher service after 31 December 2006.
- » You and your nominated partner must both sign this form.
- » You and your nominated partner must be living together in an exclusive long-term relationship.
- » You and your partner must be legally free to marry or to enter a civil partnership. (i.e. you must not be married or in a civil partnership).
- » You and your partner must be financially interdependent (i.e. you rely on your joint finances or one partner is financially dependent on the other to support your standard of living, although you do not need to be contributing equally).
- » Neither party can be currently nominated under the Scheme as the nominated partner of a third party.
- » The conditions stated in the declaration sections of the form must be met.

You should not rely on this information alone to give your partner entitlement to a pension. Following your death, the Public Sector Pensions Authority will need to be satisfied that your relationship continued to meet the qualifying conditions as defined in the Scheme rules for nomination and payment of an adult survivor pension.

Evidence of Financial Interdependency

Evidence of financial interdependency will be required if your partner makes a claim following your death. Evidence may include:

- » Confirmation you lived in a shared household together;
- » Shared bank accounts or investments;
- » A loan or mortgage in joint names;
- » Wills naming each other as the main beneficiary;
- » You hold mutual power of attorney;
- » Your partner is nominated as the main beneficiary of your life assurance.

Keep Your Nomination Up to Date

If your relationship comes to an end you should cancel and revoke your nomination by completing a Partner Nomination Revocation Form and submitting it to the PSPA as soon as possible.

Alternatively, if you enter a new relationship, you can make a new nomination by downloading and submitting a new 'Unmarried partner nomination form' from our website www.pspa.im.

Who cannot be nominated as a Surviving Adult Dependant?

The people ineligible to be nominated is based on the statutory list in the Marriage Act 1984 naming who a man or woman is ineligible to marry, and therefore ineligible to be nominated. It may change and is not exhaustive and so is only a guide. For more detailed information contact the Civil Registry.