An Roinn Oideachais
Department of Education

Information Note for
Payment of Retirement Benefits Non-Teaching Staff (NTS1)

- Please read this information note carefully before completing your retirement application form.
- In order to enable processing of your application for retirement benefits in a timely manner, please return completed application form to the Department of Education three months in advance of your chosen retirement date.

Part 1 Your Personal Details

- Please complete all contact details and personal information.
- We will communicate with you primarily through email. Please ensure that the email address you provide will be active after your retirement.

Part 2 Employer declaration

- This section must be completed by the Manager/Chairperson of your Schools Board of Management. This section does not need to be completed, if you are submitting an application for Preserved Pension Benefits **only.**

Part 3 Retirement Type

- Please select your retirement type, and enter your date of retirement.

Part 4 Your Service and Service History

- Outline details of your teaching/education service and additional details in relation to service. Additional information may be outlined on a separate sheet which must be attached to Form RET1.
- Question 26: Actual Service: Have you applied to purchase a period of “actual service”? This refers to periods of service that have not been paid for or perhaps were not previously pensionable (service before you joined the pension scheme (e.g. substitute service, part time service, whole-time service prior to joining the pension scheme).
- Question 27: Notional Service: Are you purchasing additional service known as Notional Service? If you are purchasing this service there will be a deduction on your payslip called “CPSN”.
- Question 30, 31: Have you given any other pensionable public service or do you retain benefit from any public sector pension scheme?
- Question 32, 33: Additional Voluntary Contributions (AVCs). AVCs are provided by private companies. If you have an AVC and wish to affect a transfer value (purchase additional service or pay for any outstanding deductions) this Department recommends that you first consult with your AVC provider. To ensure payment of pension benefits in a timely manner, you must inform the Department of Education, Pension Unit, Cornamaddy, Athlone, County Westmeath, in advance of your retirement date that you intend to transfer your AVCs. There is no facility to transfer an AVC once payment of lump sum has been made. If you wish to transfer funds please provide a separate letter stating clearly that you wish to affect a transfer value of your AVC fund.

Part 5A, 5B,5C Spouses' and Children's Pension Scheme

Prior to your pension entitlements being processed, it is mandatory to complete part 5A, 5B (if applicable) and have 5C signed (if applicable), all of which relate to the Spouses' and Children's Pension Scheme. Please note that completion of this part of the application form for pension benefits does not constitute an invitation to join the Spouses' and Children's Pension scheme.

- Part 5A (mandatory): Confirmation of membership of the Spouses' and Children's Pension Scheme. If you are unsure whether or not you are a member of the SCPS, you can check your payslip to see if there is a deduction entitled "1.5% SP & CH Pension".
- Part 5B (if applicable): To be completed by members of the Spouses' and Children's Pension Scheme. Please indicate your current civil status and complete as appropriate. It is essential that an Original State (Civil) Marriage Certificate, Civil Partnership Certificate and Death Certificate as appropriate are provided for inspection. An original Civil Marriage Certificate and Death Certificate may be obtained by contacting the General Register Office (G.R.O.) at +353 (0) 90 6632900 or LoCall: 1890 252 076.
- Part 5C (if applicable): This section must be signed by your spouse/civil partner.
- Where appropriate, please supply a certified copy of your Decree Absolute and Pension Adjustment Order.
- All legal documents provided by you will be copied for record purposes and returned to you.

Note: If Original State documents are not included, it may lead to a delay in the processing of your application.

Part 6A, 6B,6C Revenue Pensions Declaration

REQUIRED UNDER SECTION 787R (4) OF THE TAXES CONSOLIDATION ACT 1997.

Section 14, Finance Act 2006, introduced a new limit on the amount of an individual's tax relieved pension fund and capped the amount of tax free monies that can be taken. Both these limits are personal life time limits and apply to benefits taken or which come into payment on or after 06 December 2005.

Section 787R(4) of the Act provides that a person with retirement benefits (from any source, including all public sector superannuation schemes, but excluding social welfare benefits) with an aggregate capital value on drawdown above a specified threshold is liable for tax on the amounts above the threshold. Where the threshold is exceeded, an up-front income tax charge of 41% on the excess arises.
In order to assess potential liability to the tax, if any, every teacher claiming benefits from a Teachers Pension Scheme must complete the attached Revenue Declaration Form.

This part of the form is divided into three.

- Part 6A is, in effect, a NIL declaration regarding any additional received or retained benefits. Complete as appropriate to your personal situation.
- Part 6B must be completed and signed in all cases and relates to a Personal Funds Threshold certificate in accordance with section 787P of the Taxes Consolidation Act 1997.
- Part 6C is required only in the event that you are claiming benefits from a Teachers Pension Scheme and have relevant pension entitlements from other sources. This does not include social welfare pension benefits. You will be able to source these details from your relevant financial adviser/broker/pension administrator.

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Part 7 Declaration for pension benefits

- This is the declaration for benefits and must be signed by all applicants. If you are applying to retire on a Cost Neutral Early Retirement basis you **must** also complete the second declaration.

Part 8A, 8B, 8C Bank form

- Enter your personal bank account details. This is the account that your pension will be paid into. Remember to check the deposit limit on your account with your bank/financial institution.

Part 9 Data Protection Privacy Statement

- This section provides you with a copy of the Data Protection Privacy Statement associated with this application form. By signing the declaration on Page 8 you are acknowledging you have read this. You can retain this page for future reference.

Part 10 Where to send my application form

- This section provides you with contact details for the Pension Unit, and the details to where you can send your completed application form with any supporting documentation. There is also a space in which you can note the date you posted your form.

- Please note incomplete information or missing documentation is likely to result in delayed payment when pension benefit entitlements are being processed.

Send this application form together with any additional required documentation to:

Non-Teaching Staff Retirements
Pension Unit
Department of Education
Cornamaddy
Athlone
Co. Westmeath
N37 X659

Email: pensions@education.gov.ie

Telephone: 090 648 4189

If you are phoning from outside
the Republic of Ireland please call + 353 90 648 4189

Further important information

Please note if you choose to return to the position of an SNA after retirement your attention is drawn to Paragraph 6 of Circular 0041/2011 which states;

"*Where an SNA who is retired and is in receipt of a pension returns to the position of an SNA on or after 1 January 2011, s/he will start on the first point of the post 1 January 2011 incremental salary scale.*"

This information is available on the Department of Education and Skills website www.education.ie