

BOC Pension Scheme

Retirement benefit claim form



This form is for claiming your benefits from the BOC Pension Scheme (the Scheme) on retirement.



Please complete all relevant sections, sign and date the form and return it to the address on the back page.

Section 1: Personal details

Surname: Title (e.g. Mr, Mrs, Dr):

Forename(s): Sex: Male Female

National Insurance number: Marital status:

Address:

Postcode: Daytime telephone number:

Email address:

Please remember to inform BOC Pension Services if any of your personal details change after your pension starts.

Section 2: Claiming your Scheme benefits

This section is for claiming your Scheme benefits. If you are entitled to the redundancy pension option and would like to postpone payment, please move to Section 3.

I wish to take my benefits from the Scheme on:

(DD / MM / YYYY)
/ /

Please select one of the following options:

(Tick one box only or enter tax-free cash amount)

Option 1 - Pension only

I wish to take a pension only (Option 1 of my illustration). I do not want to take any tax-free cash.

Option 2 - Maximum tax-free cash plus reduced pension

I wish to take the maximum tax-free cash available and take the remainder of my benefits as pension (Option 2 of my illustration). I declare that the tax-free cash will not be used to increase contributions to one or more registered pension schemes.

Option 3 - Alternative tax-free cash

I wish to take a lower tax-free cash sum than the maximum (Option 3 of my illustration) and take the remainder of my benefits as pension. I declare that the tax-free cash will not be used to increase contributions to one or more registered pension schemes. I have indicated the amount of tax-free cash I would like to take here:

£

Section 3: Postponing payment under the redundancy pension option

I do not wish to take my benefits at age 55. I understand that I can choose to take my benefits at any time up to age 70.

Please move to Section 7.

(Tick box)

Section 4: AVC section benefits

If you do not have benefits in AVC section, please move to Section 5. If you have AVC section benefits, please indicate when you wish to take them.

(Tick box)

I wish to take my AVC section benefits at the same time as my Scheme benefits.

If you choose this option please complete the rest of the section.

I wish to take my AVC section benefits at a later date.

If you choose this option please move on to Section 5.

If you have requested tax-free cash in Section 2, the cash sum will automatically be taken from your AVC fund first, unless you request otherwise by writing to BOC Pension Services. Any part of your fund that cannot be used in this way may be used to provide an additional pension from the Scheme, which will be increased each year in the same way as your Scheme pension. As an alternative, you can choose to use all of your AVC fund to purchase benefits from another provider (e.g. an insurance company). You may still be able to choose to take part of your AVC fund as tax-free cash from that other provider.

By ticking the appropriate box, please indicate whether:

(Tick box)

AVC Option 1

Your AVC pension should be paid by the Scheme for the rest of your life only (Option 1 of my illustration).

AVC Option 2

Your AVC pension should be paid by the Scheme for the rest of your life then continuing at one half of your AVC pension to your dependant after your death. If you choose this option, your own pension from AVC section will be lower than the amount shown on your illustration.

Open Market Option

Your AVC fund should be used to purchase a pension with another provider. BOC Pension Services cannot advise on which provider to use but can explain the procedure involved.

Section 5: Pensions already in payment (or coming into payment on the same date as my pension from the Scheme)

You do not need to provide details of any State pensions, spouse/dependant's benefits, benefits from unregistered arrangements or any benefits you are taking **after** the date you take your benefits from the Scheme.

(Tick box)

I confirm I am **not** receiving a pension from any other arrangement (and do **not** have a pension coming into payment on the same date as my pension from the Scheme).

I confirm I am receiving, or am about to receive, a pension and/or cash sum from another arrangement and have completed the enclosed Declaration of retirement benefits form.

Section 6: Notification of account details

Name of bank/building society:

Address of bank/building society:

Postcode:

Account holder's name:

Sort code:

Account number:

Roll number (if applicable):

Your pension will be paid monthly into your bank/building society account. Please remember to inform BOC Pension Services if your account details change.

Section 7: Authorisation

I confirm that the details provided are correct to the best of my knowledge and belief.

(DD / MM / YYYY)

Signed:

Date:

General Data Protection Regulation (GDPR)

I consent to my personal information (including any sensitive personal information) being held and processed by the Scheme Trustee, BOC Pension Services and any third party appointed for the effective running of the the Scheme. I understand that the Trustee and BOC Pension Services, and any third parties to whom they make the data available, will comply with the underlying principles of applicable data protection legislation, including the General Data Protection Regulation (EU) 2016/679.

If you want to know more about the data held which relates to you or the purposes for which it may be used, please refer to the data privacy statement provided separately to you, or alternatively please contact BOC Pension Services.

The Trustee may send you information about the Scheme to your work email address. If you leave employment, information may be sent to a different email address if you have provided one

Legal note

The Trustee is not liable for any penalties arising as a result of any inaccurate information provided on this form, or any failure to provide relevant information.

Contact us

BOC Pension Services

The Priestley Centre, 10 Priestley Road, The Surrey Research Park,
Guildford, Surrey GU2 7XY, United Kingdom
Helpline 0800 096 3214, pensions.uk@boc.com

