



Application form for Payment of Retirement Benefits Teaching Staff (RET1)

How to complete this application form.

- Please read the points below carefully and use this page as a guide to filling in this application form. You can also refer to the Teaching Staff Retirement Information Note via our website.
- Please answer **ALL QUESTIONS**. Incomplete forms will be returned and this may delay the processing of your application.
- Please use BLOCK LETTERS and place an **X** in the relevant boxes.
- You may find it useful to have an up-to-date payslip and bank account details with you when completing this application form.

Specific information about each section of this application form

- **Part 1:** Please complete your personal details including a personal email address and contact number.
- **Part 2:** 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:** Please select your retirement type, and enter your date of retirement.
- **Part 4:** Please enter details of your Public Sector service history and answer the questions in relation to your employment in the Department of Education.
- **Part 5A:** Please indicate if you are a member of the Spouses' and Children's Pension Scheme (the deduction on your payslip includes "SP. & CH.") and answer the questions as outlined.
- **Part 5B:** Please also take note of the other **original** documentation you are required to submit. This is dependent on your personal circumstances. If you do not submit the required original documents, it may lead to a delay in the processing of your benefits.
- **Part 5C:** Your spouse/civil partner is required to sign Part 5C in relation to the potential provision of Spouses' and Children's Pension Scheme benefits.
- **Part 6:** Enter details relating to any additional pension benefits you may have (excluding social welfare benefits). This is a mandatory section that is required to be completed under Revenue legislation.
- **Part 7:** 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 8:** 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:** 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:** 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.



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Part 3 Retirement Type

15. Please select your reason for retirement (place an X in one box only).

- | | |
|---|--|
| <input type="checkbox"/> Reached Minimum Retirement Age/ Under "55/35" Rule | <input type="checkbox"/> Reached Compulsory Retirement Age |
| <input type="checkbox"/> Cost Neutral Early Retirement | <input type="checkbox"/> Claiming Preserved Pension Benefits |

16. Please enter your date of retirement:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D	D	M	M	Y	Y	Y	Y

Part 4 Your Service and Service History

17. List below all details of all your Public Service given in this country. Use additional pages if required.

Please include a separate line for each school or change of status within a school.

Dates of Service		Employment Status (Permanent, CID, RPT, Substitute)	School Roll Number	Name of School
From	To			

Please answer the questions below in relation to your education and absence status.

18. Please complete the following in relation to your pre-service training.

- (a) What was the duration of your pre-service training? Years
- (b) Did you complete a Higher Diploma, if so what year? Yes

Y	Y	Y	Y
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 No

19. Are you currently on a leave of absence? Yes **Go to Question 20**
 No **Go to Question 24**

20. If you answered Yes to Question 19, please give details of the type of absence in the box provided (e.g. Career break, sick leave, other - please specify).

21. If you answered Yes to Question 19, please specify the date this absence started.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	2	0	<input type="text"/>	<input type="text"/>
D	D	M	M	Y	Y	Y	Y

22. If you answered Yes to Question 19, did you resign while on leave of absence?

- Yes **Go to Question 23**
 No **Go to Question 24**

23. If you answered Yes to Question 22, please specify the date you resigned.

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	2	0	<input type="text"/>	<input type="text"/>
D	D	M	M	Y	Y	Y	Y



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Part 4 (continued)

Your Service and Service History

Please answer the questions below by placing an X in the box beside Yes or No.

24. During your teaching career did you give service:

- (a) As a member of a Religious Order or on the approved staff of a Capitation Primary School? Yes No
- (b) As a supernumerary teacher in a Primary School? Yes No
- (c) With the Agency for Personal Service Overseas (APSO/Comhlámh)? Yes No

25. Have you served as a Teachta Dála (TD), Senator or in a Ministerial capacity? Yes No

26. Have you received a marriage gratuity or a refund of contributions for service in a Public Sector Scheme? Yes Complete Question 27
 No Go to Question 28

27. If you answered Yes to Q. 26, what was the date of payment and the amount of such award or refund?

D	D	M	M	Y	Y	Y	Y

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28. Have you applied to purchase a period of actual service (buyback) given in a Primary, Secondary, Community or Comprehensive School? Yes No

29. Are you purchasing Notional Service under the Notional Service Purchase Scheme (deduction seen as CPS(N) on your payslip)? Yes No

30. Is there a court approved pension adjustment order (PAO) in place in relation to your retirement benefits? Yes No

31. Are you in receipt of, or eligible for, benefit from any other Public Service Pension Scheme? Yes No

32. Have you given pensionable service in any other State or Semi-State Organisation, e.g. Health Board or Local Authority? Yes No

Please complete the questions below in relation to Additional Voluntary Contributions:

33. Are you contributing to Additional Voluntary Contributions? (If YES, you must complete PART 6 of the application form fully). Yes **You MUST complete Part 6 Go to Question 34**
 No **Go to Part 5**

34. Do you intend to use the AVC fund to cover any shortfall in pension contributions or deductions from your lump sum gratuity? Yes **Letter indicating this must be attached to application**
If so, a letter indicating use of AVC **must** be attached to your application. No **Go to Part 5**



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Part 6A Revenue Pensions Declaration

If you are unsure of any of the answers to this question you should contact your private pension provider.

44. Have you on or after 07 December 2005:

(a) Become entitled to any pension¹, lump sum or any other pension related benefit (e.g. defined benefit / defined contribution occupational pension scheme, retirement annuity contract, PRSA, Additional Voluntary Contributions (AVC) for the purpose of supplementing retirement benefits etc.) other than your pension entitlements from the Pension Scheme currently being claimed? Yes **You MUST complete Part 6B and 6C**

No **Go to Q 44 (b)**

(b) Did you direct on or after that date (7 December 2005) that a payment or transfer be made to an overseas pension arrangement? Yes **You MUST complete Part 6B and 6C**

No **If you also answered no to Q44 (a) Go to Part 6B**

¹ = This does not include i) social welfare benefits, such as the State Pension or ii) private pension benefits which you received or which came into payment before 07 December 2005.

Part 6B Revenue Pensions Declaration—Personal Funds Threshold (PFT)

If you are unsure of any of the answers to this question you should contact your private pension provider.

45. Do you have a certificate from the Revenue Commissioners stating the amount of the Personal Funds Threshold (PFT) in accordance with Section 787P of the Taxes Consolidation Act 1997? Yes Letter indicating this must be attached to your application, Go to Part 6C

(If the answer is YES, please enclose a copy) No Go to Part 6C

Please be aware that there is provision in the legislation that, where the capital value of one's pension benefits exceeds the standard fund threshold (SFT)/personal funds threshold (PFT), tax due on any chargeable excess may be deducted from the pensioner's lump sum or ongoing pension.

Part 6C Revenue Pensions Declaration—Benefit Details

If you are unsure of any of the answers to this question you should contact your private pension provider.

If you have an entitlement to any relevant pension benefit, other than the current pension entitlement now being claimed, please provide details relating to this entitlement in the space below and on Page 7. You may wish to enclose further information on an additional page.

46. Type of Pension Arrangement (Place an X in the box with the most appropriate description):

<input type="checkbox"/> Defined Benefit Occupational Pension Scheme	<input type="checkbox"/> Retirement Annuity Contract
<input type="checkbox"/> Defined Contribution Occupational Pension Scheme	<input type="checkbox"/> Personal Retirement Savings Account
<input type="checkbox"/> AVC Pension Scheme	<input type="checkbox"/> Other: Please specify <input style="width: 150px; height: 20px;" type="text"/>



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Part 7 Declaration for pension benefits

54. To formally apply for your pension benefits and retirement lump sum gratuity from the Department of Education please read the declaration outlined below, place an X in each box to indicate you have read the declaration and sign the space below.

I declare that:

- 1) I wish to make an application for payment of annual pension benefit and lump sum gratuity. I certify that to the best of my knowledge the information I have provided on this form is true and correct.
- 2) I have completed the bank account details requested in Part 8A to 8D of this application form.
- 3) I have read and understand the Data Protection Privacy statement as outlined on Page 11 of this application form.
- 4) I have enclosed all additional documents that apply to my specific personal circumstances (e.g. Marriage Certificate/Civil Partnership Certificate/Death Certificate/Decree Absolute/Pension Adjustment Order (PAO))

Signature of Applicant (not block letters)

Name of Applicant in BLOCK LETTERS

Date:

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D D M M Y Y Y Y

55. For members retiring on Cost Neutral Early Retirement grounds (only). Place an X in each box to indicate you have read the declaration and sign in the space below to agree to the terms of Cost Neutral Early Retirement.

- 5) I wish to apply for **actuarially reduced pension benefit and lump sum gratuity** payable on retirement in accordance with the terms of Circular Letter PEN 07/05.
- 6) I understand that my acceptance of Cost Neutral Early Retirement means that all of the relevant conditions of the Scheme, as set out in Circular Letter PEN 07/05, will apply to my retirement.
- 7) I accept that the **actuarially reduced rate of pension benefits to me will apply throughout the lifetime of the pension** (subject to normal adjustments in line with public service pensions generally).
- 8) I accept that once I have retired on actuarially reduced pension benefits, I do not have an option to subsequently switch to payment of a preserved pension at standard preservation age (for Old Entrants this is Age 60; for New Entrants this is Age 65).
- 9) I have no right of return to work in the public service, other than through normal recruitment/selection procedures.
- 10) I understand I have no entitlement to a Supplementary Pension payment from the Department of Education until I reach my normal retirement age (for Old Entrants this is Age 60; for New Entrants this is Age 65). The implications of early retirement for my social welfare benefits are my responsibility.

Signature of Applicant (not block letters)

Name of Applicant in BLOCK LETTERS

Date:

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D D M M Y Y Y Y



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Part 8A

Bank Account and Bank Authorisation Details

Please read the Important Note below carefully and complete this form using **BLOCK LETTERS**.

IMPORTANT! Some financial institutions place a limit on the amount of money that can be deposited into certain accounts. The **responsibility is on you, the retiree** to check this with your nominated financial institution **before** completing your bank details. Please note, if there is a limit on your nominated account the transfer of your fortnightly pension and lump sum gratuity payment may not be accepted by the account, resulting in a delay of payment.

56. Surname:

57. First name(s):

58. Title: Mr. Mrs. Ms. Other:

59. Your PPS Number:

60. Your Payroll Number:

61. Your home address and Eircode:

62. Your telephone number: MOBILE
 LANDLINE

63. Your personal email address:

Part 8B

Your Personal Bank Account details

64. Your Bank sort code: - -

65. Your Account Number:

66. Your Account IBAN Number:

67. Your Account BIC/ SWIFT:

68. Your Bank's Name, Address and Eircode:



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Part 8C Data Protection Privacy Statement (Bank Form)

69. The main purpose for which this Department requires the personal data provided by you is to ensure that your pension payment is paid to your nominated bank account by means of Electronic Fund Transfer (EFT). The personal data provided will be exchanged with the Payroll Division of this Department to ensure payment is issued and with the Revenue Commissioners, the Department of Employment Affairs and Social Protection as required by law; and any other bodies to which you have instructed the Department to forward voluntary deductions made from your pension payments.

The privacy notice outlining further information in relation to this form can be found at:

<https://www.gov.ie/en/collection/general-data-protection-regulation-gdpr-privacy-notice/>

Full details of this Department's data protection policy setting out how we will use your personal data as well as information regarding your rights as a data subject are available at:

<https://www.gov.ie/en/organisation-information/data-protection/>

Details of this policy and privacy notice are also available in hard copy from the address on Page 11 upon request.

Part 8D Bank Account Authorisation Declaration

70. Please read and sign the declaration below:

- I understand that my pension benefit and lump sum gratuity will be paid directly to my bank account;
- I understand that any amount of pension properly due to me at the date of my death will be payable to my estate on completion of the necessary legal requirements;
- I understand that my pension benefit and lump sum gratuity will be made in € (euro) only;
- I have read and understand the Data Protection Privacy Statement above.

Signature of Applicant (not block letters)

Date:

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D D M M Y Y Y Y

Signature of 2nd Account holder (not block letters)

(Applies to Joint Accounts only)

Date:

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D D M M Y Y Y Y

OFFICIAL USE ONLY

Input for Pay Issue:

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Checked by:

Signature of officer (not block letters)

Date:

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D D M M Y Y Y Y

Signature of checking officer (not block letters)

Date:

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2	0		
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D D M M Y Y Y Y



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You may wish to retain this page for future reference.

Part 9 Data Protection Privacy Statement

Data Protection Privacy Statement for your Records

The **main purpose** for which the Department requires the personal data provided by you is to assess, consider, process and where possible, award the person named on this application form, a lump sum gratuity payment and an annual pension payment payable via the Payroll Division of this Department, subject to the current legislation at the time of award.

The personal data provided may be exchanged with other public sector pension administrators/ other pension regulatory bodies, where necessary, the Revenue Commissioners, the Department of Employment Affairs and Social Protection as required by law; and any other Government Department including the Department of Public Expenditure & Reform.

The privacy notice outlining further information in relation to this application form (ATH 4.13) can be found at:

<https://www.gov.ie/en/collection/general-data-protection-regulation-gdpr-privacy-notices/>

Full details of this Department's data protection policy setting out how we will use your personal data as well as information regarding your rights as a data subject are available at:

<https://www.gov.ie/en/organisation-information/data-protection/>

Details of this policy and privacy notice are also available in hard copy from the address below upon request.

Part 10 Where to send my application form

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

Retirements Section
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

You may wish to enter the date you have submitted your application for reference.

Date Application Sent:

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D D M M Y Y Y Y