

Transitional Tax-Free Amount Certificate Application Form

Application in respect of a deceased scheme member

All personal information will be held in accordance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018.

Deceased member's name:

Legal personal representative's name:

Address:

Legal personal representative's address:

Post Code:

National Ins. Number:

Post Code:

Date of Death:

Declaration

1. I wish to apply to Civil Service Pensions (NI) for a Transitional Tax-Free Amount Certificate in respect of the above-named deceased member.
 2. I have read the Transitional Tax-Free Amount Certificate Information Sheet and understand the information I must provide as part of my application.
 3. I certify that the evidence I have submitted with this form constitutes 'complete evidence' of **all** of the above member's benefit crystallisation events, and tax-free lump sums received between 6 April 2006 and 5 April 2024, and agree to Civil Service Pensions (NI) taking this evidence at face value.
 4. To the best of my knowledge, the aboved-named member did not have a Relevant Benefit Crystallisation Event at any time after 6 April 2024.
 5. I understand there is a 90-day timescale for providing a response to my application.
 6. If there are any errors in the evidence I have provided, it will change the figures detailed in the Transitional Tax-Free Amount Certificate and the certificate becomes invalid*. I undertake to notify Civil Service Pensions (NI) if I become aware of any errors in this evidence or information which has not been taken into account when producing the certificate.
 7. Have you received benefits from any pension scheme, other than the Northern Ireland Civil Service Pension Scheme (NICSPS), before 6 April 2024?*
- Yes** **No** t the only benefits I have received are from the NICSPS

* This includes any changes to the member's benefits under the Remedy exercise

By ticking this box I declare that I am the person named on this form and that the information provided is true and accurate. I also declare that I am aware that the provision of false information may lead to prosecution.

Date:

Please submit the completed form to: **cspensions@finance-ni.gov.uk**

All personal information submitted to Civil Service Pensions (NI) is held in accordance with Civil Service Pensions, Department of Finance, Privacy Policy which is published on the CSP(NI) website:

www.finance-ni.gov.uk/civilservicepensions-ni