

University of York Pension Fund

Application form

Your details

Title and full name

National Insurance number

Date of birth

<input type="text"/>	<input type="text"/>
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Employer

Home address

Telephone number

Email address

Marital status

Single

Unmarried partner

*Married

*Registered civil partnership

*Widow / Widower

*Divorced

*Date(s) of event

Declaration

(Tick as applicable)

I can confirm that I have received a copy of the scheme guide, which I have read and understood.

I can confirm that I am actively at work (see notes overleaf). I understand that if I have made a false declaration about my actively at work status, I may not be covered for the death in service lump sum.

I understand that I will be entered into the Fund in **Tier 1** and hereby authorise my employer to deduct from my salary, contributions at 7.00% or such future rates as may be required.

You will be entered into Tier 1 by default unless you elect to join Tier 2

OR

I elect to contribute to the University of York Pension Fund **Tier 2** and hereby authorise my employer to deduct from my salary contributions at 6.00% or such future rates as may be required. I am aware that choosing this option will result in a lower pension benefit entitlement

Signed

Date

What to do next

Please send this completed form to the Pensions Office. Remember to include one of the following documents with your application form:

- your original birth certificate (if this is not in your current name please include marriage certificate / decree absolute or change of name by Deed Poll to verify any name changes)
- current valid passport
- current valid photocard driving licence.

Your application cannot be accepted without an original valid form of ID.

It is recommended that you send these documents to us via registered post; they will be returned to you in the same way. Please send your documents to: **The Pensions Office, Heslington Hall, York, YO10 5DD.**

Notes

Actively at work

Being actively at work means that you have not received medical advice to refrain from work and are actively engaged in or otherwise following your normal occupation i.e. you are mentally and physically capable of working your normal contracted number of hours, either at your usual place of business or at the location to which business requires you to travel. If you are not actively at work (other than on holiday or on maternity, paternity and adoption leave), then you can still join the Fund but may be required to complete an underwriting process with the Fund's insurer for the death in service lump sum benefit.

Refund of Contributions

If you leave the University of York Pension Fund with less than two years membership, you will be entitled to a refund of your contributions. However, if you contribute via a salary sacrifice scheme, and leave with less than two years membership, a refund cannot be paid, and you will be awarded deferred benefits in the University of York Pension Fund. If you contribute via a salary sacrifice scheme, and leave with less than three months membership, a refund cannot be paid and no deferred benefits will be awarded.

When you join the Pension Fund, if you are on a contract of less than two years, you will not be entered into a salary sacrifice scheme, to protect your refund entitlement. However, you can still opt to make contributions by salary sacrifice.

If, when you join the Pension Fund, you are on a contract of longer than two years, you will make contributions by salary sacrifice as standard. You will be given a form to opt out if you wish.

Data protection

The Trustee is responsible for the governance and administration of the Scheme. For the purposes of the General Data Protection Regulation which came into force on 25th May 2018, the Trustee is the data controller in relation to the Scheme and the Trustee is ultimately responsible for compliance with all data protection laws. The Trustee will keep your personal data, in accordance with the law and regulatory guidance, for as long as is necessary for the purpose(s) for which it was collected. The Trustee will share your personal data as necessary with the Company Secretary and with other advisers and service providers used to help administer the Scheme.

For full details of how the Trustee obtains, uses and protects any personal data that you provide, or that is otherwise obtained or generated by the Trustee, please see the University of York Pension Fund's Privacy Notice, which is available on our website here <https://www.york.ac.uk/pensions>.

Please contact the Pensions Office if you have any questions regarding this.

For Pensions Team use only

Date of joining

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Please tick all that apply:

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Evidence of date of birth received |
| <input type="checkbox"/> | Late entrant medical form completed |
| <input type="checkbox"/> | Late entrant form sent to medical underwriters |
| <input type="checkbox"/> | New member record created in Resource Link |
| <input type="checkbox"/> | Default Tier 1 |
| <input type="checkbox"/> | Elected for Tier 2 (payroll notified) |

Signed

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Date

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