

**STATE PENSION QUESTIONNAIRE**

	Client 1	Client 2
<b>Surname</b>		
<b>Forenames</b>		
<b>Maiden Name (if applicable)</b>		
<b>Date of Birth</b>		
<b>Address (Australia)</b>		
<b>Previous UK Address 1</b>		
<b>Previous UK Address 2</b>		
<b>Contact number</b>		
<b>E-mail address</b>		
<b>Marital status</b>		<b>Date of Marriage (if applicable)</b>
<b>National Insurance number</b>		
<b>Date Stopped Working UK</b>		
<b>Date Left UK</b>		
<b>Date Entered Australia</b>		
<b>Current Employment Status</b>		
<b>Do you have a UK Pension you would be interested in Transferring to your Australian Super?</b>	<b>YES / NO</b> <b>If yes:</b> Please complete a Data Authority form for each pension you hold in the UK. We will contact the UK for a current transfer value and produce a complementary Taxation Report.	

# AGREEMENT TO STATE PENSION SERVICE

I acknowledge that I have requested assistance with obtaining my present entitlement to the UK State Pension, and ways on how I can improve this entitlement, thus enhancing my income in retirement. I am aware that there is a fee for this service and I acknowledge that I will settle my account with PTS personally.

Due to the complexity and certain eligibility conditions for the UK State Pension we have a range of State Pension Services we are able to assist you with. Please select the service you wish to proceed by ticking the service/s you wish use:

## The Top up Service

- Full Top-Up Service: **\$550 (INC GST)**
- Full Top-Up Service for Couple: **\$950 (INC GST)**

*Upon receipt of your signed agreement we will contact the UK to request your State Pension Statement. We will also issue you with an employment pack to enable us to collate the information required for the appeal process. At this stage we will issue you with an invoice which is payable within 30 days.*

## Claiming your UK State Pension

Please select either Option A or B

### Option A

- Claiming UK Pension (If you have not claimed your UK Pension and are within 3 months of reaching UK State Pension age or within one year of state pension age): **\$350 (INC GST)**

### Option B

- Claiming UK Pension (If you reached your State Pension Age prior to 5 April 2016 and deferred taking this for more than 1 year we are able to claim an additional lump sum payment with interest): **\$550 (INC GST)**

**AND** (Optional Additional Service)

- Increasing UK State Pension whilst over State Pension Age (If you are currently working and you would like to increase your pension income in retirement by topping up your National Insurance Contributions) **\$550 (INC GST)**

Signed

.....  
**NAME:** Date .....

Please ensure you tick for the appropriate service you authorise Pension Transfer Specialists to complete

\*Your invoice is payable within the terms indicated and failure to comply may necessitate in legal action being taken against you resulting in additional legal and court costs which you will be liable for. Any expenses incurred relating to any debt collection costs, dishonoured cheque(s) fees, legal costs, whether charged on scale or on any other basis incurred shall be paid by you on demand.

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**State pensions- Weekly entitlements and Class 2 contributions**

April 2017 to April 2018

Current weekly pension £159.55

Class 2 NIC £2.85

Class 3 NIC £14.25

Qualifying years	Weekly pension	Annual Pension	Weekly Pension	Annual Pension
	£*	£*	\$*	\$*
35	£ 159.55	£ 8,296.60	\$ 271.24	\$ 14,104.22
34	£ 154.99	£ 8,059.55	\$ 263.49	\$ 13,701.24
33	£ 150.43	£ 7,822.51	\$ 255.74	\$ 13,298.26
32	£ 145.87	£ 7,585.46	\$ 247.99	\$ 12,895.29
31	£ 141.32	£ 7,348.42	\$ 240.24	\$ 12,492.31
30	£ 136.76	£ 7,111.37	\$ 232.49	\$ 12,089.33
29	£ 132.20	£ 6,874.33	\$ 224.74	\$ 11,686.35
28	£ 127.64	£ 6,637.28	\$ 216.99	\$ 11,283.38
27	£ 123.08	£ 6,400.23	\$ 209.24	\$ 10,880.40
26	£ 118.52	£ 6,163.19	\$ 201.49	\$ 10,477.42
25	£ 113.96	£ 5,926.14	\$ 193.74	\$ 10,074.44
24	£ 109.41	£ 5,689.10	\$ 185.99	\$ 9,671.47
23	£ 104.85	£ 5,452.05	\$ 178.24	\$ 9,268.49
22	£ 100.29	£ 5,215.01	\$ 170.49	\$ 8,865.51
21	£ 95.73	£ 4,977.96	\$ 162.74	\$ 8,462.53
20	£ 91.17	£ 4,740.91	\$ 154.99	\$ 8,059.55
19	£ 86.61	£ 4,503.87	\$ 147.24	\$ 7,656.58
18	£ 82.05	£ 4,266.82	\$ 139.49	\$ 7,253.60
17	£ 77.50	£ 4,029.78	\$ 131.74	\$ 6,850.62
16	£ 72.94	£ 3,792.73	\$ 123.99	\$ 6,447.64
15	£ 68.38	£ 3,555.69	\$ 116.24	\$ 6,044.67
14	£ 63.82	£ 3,318.64	\$ 108.49	\$ 5,641.69
13	£ 59.26	£ 3,081.59	\$ 100.74	\$ 5,238.71
12	£ 54.70	£ 2,844.55	\$ 92.99	\$ 4,835.73
11	£ 50.14	£ 2,607.50	\$ 85.25	\$ 4,432.75
10	£ 45.59	£ 2,370.46	\$ 77.50	\$ 4,029.78
9	£ 41.03	£ 2,133.41	\$ 69.75	\$ 3,626.80
8	£ 36.47	£ 1,896.37	\$ 62.00	\$ 3,223.82
7	£ 31.91	£ 1,659.32	\$ 54.25	\$ 2,820.84
6	£ 27.35	£ 1,422.27	\$ 46.50	\$ 2,417.87
5	£ 22.79	£ 1,185.23	\$ 38.75	\$ 2,014.89
4	£ 18.23	£ 948.18	\$ 31.00	\$ 1,611.91
3	£ 13.68	£ 711.14	\$ 23.25	\$ 1,208.93
2	£ 9.12	£ 474.09	\$ 15.50	\$ 805.96
1	£ 4.56	£ 237.05	\$ 7.75	\$ 402.98

FIGURES ABOVE ARE BASED ON RATES AS AT APRIL 2017 AND AN ILLUSATRIVE ASSUMED £1/\$1.70

Due to pending legislation changes, if you have less than 10 complete UK Tax years' contributions, you will NOT be eligible to claim a UK pension, although you have paid into this. It Is very beneficial to at least make sure that you have topped up the full 10 years, rather than lose your entitlement.

# AUTHORITY DATA FORM



I hereby authorise Colette Pieniasek, Nicola Butler and Emma Kenworthy of PTS Pension Transfer Specialists, to obtain information on my behalf in relation to my pension scheme detailed below.

Would you release the overseas transfer forms and information relating to the pension scheme to the following address:-**Level 2, 5 Davidson Terrace, Joondalup WA 6027 Australia**  
**Telephone + 61 8 9233 9269 Fax + 61 8 9301 5819 Email – [pensions@ptspecialists.com.au](mailto:pensions@ptspecialists.com.au)**

<b>Name:</b>
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<b>Address (Australia):</b>
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<b>Visa Type:</b> <input type="checkbox"/> Temporary <input type="checkbox"/> Permanent Residency <input type="checkbox"/> Citizen	<b>Date of Residency:</b>  _____
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*Last date arrived in Australia with intention to stay permanently - or date of return for expats, excluding holidays. This will be assumed to be your date of first Australian tax residency, not your visa status date.*

<b>Contact Number(s):</b>	<b>Email:</b>
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<b>National Insurance No:</b>	<b>Date Of Birth:</b>
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## UK FUND DETAILS

<b>Name of the UK Pension Scheme</b> <i>(e.g. NHS, Teachers, Prudential, Standard Life)</i>		
<b>Address of UK Pension Scheme</b> <i>(Employers address/Scheme administrator or Insurance Company)</i>		Not Known
<b>Policy, Scheme or Reference Number</b>		Not Known

If you cannot provide the information above do not delay in returning this form.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*