

# Payment of deferred benefits due to ill health – application form

## The TSB Pension Scheme

Action point

Complete this form if you would like to apply for early payment of your deferred benefits on the grounds of ill health. Once you have completed the sections relevant to you in BLOCK CAPITALS and black ink, please sign, date and return to:

 **Equiniti**, PO Box 4945, AspectHouse Spencer Road Lancing BN99 8LQ

If you have any questions please contact Equiniti:

 0345 266 9214

 [tsbpensions@equiniti.com](mailto:tsbpensions@equiniti.com)

### Section A – Your details

Full name (in capitals):

Date of leaving:

National Insurance number:

### Section B – Your employment declaration

In considering your application for early payment of your deferred benefits on the grounds of ill health, we need to take into account any employment you have undertaken since leaving TSB. Please note that you may need to provide further medical information in order to have your application approved.

**Have you been employed or worked in any capacity since leaving the employment of TSB?**

Yes

No

If the answer is 'Yes', please complete Section C (overleaf).

**Are you currently working?**

Yes

No

If the answer is 'No', please state the reason for absence, whether due to medical reasons or other. If other, please specify:

## Section C – Employment details

Employer's Name

Nature of work undertaken:

Dates of employment

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## Section D – Declaration

I declare that the above information about my employment since leaving TSB is full and accurate.

### Data Protection

The Trustee of the Scheme is a data controller in respect of personal data processing for the administration of the Scheme.

As data controller, the Trustee holds and processes certain personal data about you, as a Scheme member, and possibly those of your dependants and beneficiaries. Personal data means information that can be used to identify you, such as your name. The Trustee holds and processes this data to properly administer the Scheme and to comply with the law.

The types of data the Trustee may collect and hold will include, for example, your national insurance number, date of birth and your postal address. The Trustee generally collects this data from you and from TSB. Some of the data the Trustee collects may be classed as 'sensitive data', such as information you tell us about your health when applying for ill-health pension benefits. The Trustee may require your consent to collect and hold this data.

As the Trustee is assisted by third parties to properly administer the scheme, your personal data may be shared with these parties, including for example, the Scheme's administrator, the Trustee's professional advisers (such as the Scheme's lawyers), service providers, regulators and Government bodies. Your personal data may also be shared with TSB.

### Consent

As part of your application for early payment of your deferred benefits on the grounds of ill health, and to enable the Trustee to effectively administer the early payment of your deferred benefits on the grounds of ill health, the Trustee will process information about your health. By law, information about your health constitutes "special category personal data" and in order to process special category personal data the Trustee requires your explicit consent to the processing.

The Trustee shall process this health information to assess and, in some cases, review, information about your health to determine eligibility for the early payment of your deferred benefits on the grounds of ill health and to determine the appropriate benefit level. The Trustee may use a medical adviser to process this health information.

You may withdraw your consent to any of the above processing activities at any time by sending an email to [tsbpensions@equiniti.com](mailto:tsbpensions@equiniti.com) or calling Equiniti on 0345 266 9214. If you withdraw your consent above, the Trustee will cease processing the relevant health information when we receive your notice of withdrawal unless we have another lawful reason to continue to process your health information. If you refuse to consent, or subsequently withdraw your consent to it being processed, we will not be able to consider all relevant factors in respect of your application for, or early payment of your deferred benefits on the grounds of ill health.

I confirm that I have read and understood the information above and the data protection notice at [www.tsbpensionscheme.co.uk/pensions\\_talk](http://www.tsbpensionscheme.co.uk/pensions_talk) before completing and signing this form. I understand that the Trustee will process my personal data and my special category personal data for the purposes and manner described in the data protection notice at [www.tsbpensionscheme.co.uk/pensions\\_talk](http://www.tsbpensionscheme.co.uk/pensions_talk).

I give my consent to this processing of my health information, including the passing of this information to third parties where relevant.

Signed:

Date: