

# UNIVERSITY OF YORK PENSION FUND

## Application form

### Your details

Title: \_\_\_\_\_

Forename: \_\_\_\_\_

Other (middle) names: \_\_\_\_\_

Surname: \_\_\_\_\_

Employer: \_\_\_\_\_

National Insurance number: \_\_\_\_\_ Date of birth: \_\_\_\_\_

We will need to see one of the following documents in order to verify your date of birth:

- 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.

### Your contact details

Home address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone number: \_\_\_\_\_

Personal email address: \_\_\_\_\_

Please do not use your @york.ac.uk email address

## Marital status

<input type="checkbox"/>	Single	<input type="checkbox"/>	Unmarried partner	<input type="checkbox"/>	Married*
<input type="checkbox"/>	Registered civil partnership*	<input type="checkbox"/>	Widow / Widower*	<input type="checkbox"/>	Divorced*

\*Date of event

---

## Actively at work

One of the benefits of membership of the Fund is a lump sum which is payable in the event of your death. Depending on your circumstances you may be covered for this automatically, or may have to go through a medical underwriting process. In order to check whether you need to go through an underwriting process, we have to check whether you are “actively at work” on the day that your membership of the Fund will start. Please read the notes attached to this form for further information about when your membership will start from. You can check with the Pensions Team if you are not sure.

Being “actively at work” on the start date of your membership means that you have not received medical advice not to work. You must confirm that you are actively engaged in work or are otherwise capable of undertaking your normal job on the day that your membership of the Fund will start, i.e. you are mentally and physically capable of working your normal contracted number of hours, either at your usual place of work or at the location to which your employer may require you to travel.

If the start date of your membership falls on a day that you would not ordinarily work (for example, a weekend, a day you are on annual or parental leave) then you need to confirm if you were capable of working on that day. In these circumstances you would still be “actively at work”.

If you are not “actively at work” owing to incapacity or illness then you can still join the Fund but may be required to complete a medical underwriting process with the Fund’s insurer for the death in service lump sum benefit.

Please tick the box to indicate whether or not you are / were actively at work on the date that your membership of the Fund will commence.

<input type="checkbox"/>	I confirm that I am / was actively at work on the day my membership will begin
<input type="checkbox"/>	I am / was not actively at work on the day my membership will begin

## Declaration

- I can confirm that I have read, understood and agree to all of the notes which accompany this application form.
- I authorise my employer to deduct contributions from my salary at the relevant rate.
- I understand that my actively at work status will be confirmed with my employer before my application is accepted.
- I understand that if I have made a false declaration about my actively at work status, or do not complete the medical underwriting process within the required timescale, there may be no lump sum payable in the event of my death.
- I confirm that the information I have supplied is true and complete.

## Signature

You must sign the form using a wet ink signature.

Signed:

---

Date:

---

## What to do next

- Please send this completed form to the Pensions Team. Remember to include your original valid form of ID. Please return your completed form to:  
Pensions Office  
University of York  
Heslington  
York  
YO10 5DD
- Alternatively, you can [book an appointment](#) to return your form and present your ID in person.
- Please also ensure that you complete a [nomination form](#) to include with your application for membership.

## Notes

### Membership start date

You first become eligible for membership of the Fund after completing two years continuous employment with one or more of the employers which participate in the Fund.

If you are applying for membership in the month during which you reach your two-year anniversary of completing continuous employment, then your first day of membership of the Fund will be the anniversary of you completing two years continuous employment.

If you are applying for membership in any month after first becoming eligible, your first day of membership will be the start of the month in which you complete the application process.

For example:

- If you started employment on 6 April 2022, then the first day you were eligible for membership of the Fund was 6 April 2024.
- If you completed the application process on any date between 6 April and 30 April 2024 then your membership would commence from 6 April 2024.
- However, if you completed this application process on any date in June 2024, then your first day of membership would be 1 June 2024.

### Contributions

You can view current accrual and contribution rates for each membership Tier at [www.york.ac.uk/pensions](http://www.york.ac.uk/pensions). By completing this application form, you will automatically be entered into Tier CRB1 by default. If you wish to apply to go into Tier CRB2, where you will receive a lower level of benefits but pay less in contributions, please also complete [this form](#).

### 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 via your employer.

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 can opt out if you wish via your employer.

## 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 Team if you have any questions regarding this.