|  |  |
| --- | --- |
| **Resource Toolkit** | Single Scheme Administration Project (Phase 1)  **Ill-Health Retirement Resources** |
| **Resource Name** | Final Retirement Statement Short-Service Gratuity Template |
| **Resource Reference** | SPS.RET.IHR.TS.04 (Phase 1) |
| **Description** | This Statement may be completed and issued to a member shortly after ill-health retirement to confirm their definitive retirement benefit. |
| **Version** | V1.0 |

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| **PLEASE NOTE:** Administratorsmay accesslegislation, Circulars or Letters to Personnel Officers noted in this Procedure by accessing the Circulars & Legislation Section of the Single Scheme Website at [www.singlepensionscheme.ie/circulars](http://www.singlepensionscheme.ie/circulars) |

**Single Public Service Pension Scheme**

***Final Ill-Health Retirement Benefit Statement***

**(*Short-Service Gratuity)***

**issued by <<insert Relevant Authority Name>> on <<dd/mm/yyyy>>**

**Part A- Personal Information**

|  |  |
| --- | --- |
| **Member Name** |  |
| **PPS Number** |  |
| **Date of Birth** | dd/mm/yyyy |
| **Date of Retirement** | dd/mm/yyyy |
| **Type of Retirement** | Ill-Health Retirement |
| **Home Address** |  |
| **Civil Status** | <<Single, Married, Civil Partnered,  Co-Habiting, Separated, Divorced, Widowed, Surviving Civil Partner,  A former Civil Partner>> |
| **Pension Adjustment Order**  **(issued under the Family Law Acts)1** | <<No OR Yes>> |

**Part B - About your Statement**

**What is the purpose of my Statement?**

Your Statement is being issued following your retirement on the date noted above. It provides you with important information about your entitlements on retirement as a member of the Single Public Service Pension Scheme. It should be read in conjunction with the following documents:

* The information contained on the cover letter;
* Your Interim Retirement Benefit Statement
* The Scheme Leaflet that is available at *www.singlepensionscheme.gov.ie*
* The Important Notes at the end of your Statement.

**What information does my Statement contain?**

Your Statement contains information on the following:

|  |  |
| --- | --- |
| **Part A** | This confirms the personal information that we hold for you. You should review this now to make sure that it is correct. If any information is not correct, you should make contact with your Pensions Officer (see Part G) as soon as possible because the benefits on your Statement may need to be reviewed. |
| **Part C** | This provides details of the once-off Short-Service Gratuity amount payable to you based on your earnings up to the date of your retirement. |
| **Part D** | This provides details of other benefits that may be payable to your Spouse/Civil Partner or eligible Children, if applicable, on your death in retirement. |
| **Part E** | This provides a summary of all of your employments in the public service where you earned Single Scheme benefits that are included in this Statement and where did you not receive a refund of contributions. It is based on the information provided to us in documentation by your former employers. If you think that this information may not be correct, you should contact your Pensions Officer (see Part H) as soon as possible because the benefits on your Statement may need to be reviewed. |
| **Part F** | This informs you how you can obtain information on other benefits that may be payable to you separately by the Department of Social Protection. |
| **Part G** | This provides information on how you can obtain further information and how to contact your Pensions Officer in the event of that you have a query about your Statement. |
| **Part H** | This provides explanations for some of the information contained on your Statement. It is very important that you read and understand this section as it contains key information in relation to your benefits under the Scheme. |

**Part C – Your Retirement Benefits**

As you did not complete 2 years as a member of the Scheme by the date of your retirement, you are not eligible to receive an annual retirement pension. You are only eligible to receive a once-off tax-free gratuity. This is calculated as 8.5% of your actual pensionable pay for the period of your membership of the Single Scheme (see also Part E). This gratuity is called a Short-Service Gratuity. You can find further details of how this retirement benefit is calculated in your Scheme Leaflet and in Guidance Note 01/2017.

In the following table, you will find a summary of the actual pensionable pay you earned to the date of your retirement as a member of the Single Scheme. All amounts that you have earned under all Single Scheme employments, for which you did not receive a refund of contributions, are included in this Statement (see also Part E):

|  |  |
| --- | --- |
| **Period of employment (years)** | <<0.000 >> |
| **Pensionable pay earned to retirement date [A]** | € |
|  |  |
| **Short Service Gratuity amount due [A] x 8.5%** | € |
| **Expected Short Service Gratuity payment date** | dd/mm/yyyy |

**Part D - Other benefits that may be payable after retirement**

Other than the Short Service Gratuity noted at Part C,there are **no other benefits payable** on your retirement or on your death in retirement as a result of your Single Scheme membership. For the avoidance of any doubt, there is no survivor benefit payable.

**Part E – What Single Scheme employments have been taken into account?**

The table below shows all retirement amounts earned by you across all Single Scheme public service employments to the date of your retirement (where Single Scheme contributions were not refunded back to you).

|  |  |  |  |
| --- | --- | --- | --- |
| **Single Scheme Employer** | **Period of Single Public Service Pension Scheme Membership\*** | | **Accrual category** |
| **From** | **To** |
| Current Employer | <<dd/mm/yyyy>> | <<Date of retirement>> | <<Standard, Uniformed>> |
| <<Insert Former Employer Name>> | <<dd/mm/yyyy>> | <<dd/mm/yyyy>> | <<Standard, Uniformed>> |
| <<Insert Former Employer Name>> | <<dd/mm/yyyy>> | <<dd/mm/yyyy>> | <<Standard, Uniformed>> |

*(\* These dates may include periods of unpaid leave with an employer during which time*

*you were not eligible to earn benefits under the Scheme)*

The information above has been provided to us in documents completed by your former employers.

If you think that any of this information may not be correct, you should contact your Pensions Officer (see Part H) as soon as possible because the benefits on your Statement may need to be reviewed.

**Part F –Department of Social Protection benefits**

In addition to the benefits that are payable to you under this Scheme, you may be entitled to receive benefits from the Department of Social Protection. Your employer cannot provide you with information on these benefits. You can obtain information from the Department of Social Protection by telephone at LoCall 1890 500 000 or via their website at [*www.welfare.ie*](http://www.welfare.ie)

The payment of benefits to you by the Department of Social Protection do not affect your entitlements under this Scheme.

**Part G –If you have further queries**

You should consult the documentation referred to in Part B of your Statement. If you still have queries, you should contact your employer’s Pensions Officer:

*<<insert full contact details for Employer Pensions Officer>>*

**Part H –Important Notes**

(*Part A)* **1** If a Pensions Adjustment Order has been issued by a Family Law Court and applies to your benefits under this Scheme, the benefits noted in this Statement make allowance for this. Further information on your Pensions Adjustment Order can be obtained from your legal advisor. General information on Pension Adjustment Orders is also available from the Pensions Authority at www.pensionsauthority.ie

**Disclaimer:** This statement has been carefully prepared by your employer. In the event of a dispute that cannot be resolved with your employer, the terms of the Public Service Pensions (Single Scheme and Other Provisions) Act 2012 and associated regulations shall apply.