

# Help using this PDF claim form

In this PDF form we have introduced a special feature that lets you save it in Adobe Reader 8.1.2 and later. This means that you no longer have to complete the form in one session.

This form will only work if you:

- save it to your computer, then
- open it in Acrobat Reader version 8.1.2 or later.

The form will not work in:

- older versions of Acrobat Reader
- other pdf readers, for example *Preview* on a Mac or *Foxit* on a PC
- your web browser window.

**If you are having technical difficulties:**

- downloading the form
- Navigating around the form, or
- printing the form

Please contact the **eService helpdesk**.

Phone: **0845 601 80 40**

Minicom (textphone): **0845 601 80 39**

Email: **[eservicehelpdesk@dwp.gsi.gov.uk](mailto:eservicehelpdesk@dwp.gsi.gov.uk)**

Opening hours

Monday to Friday: 08.00am - 09.00pm

Weekend: 08.00am - 04.00pm

Closed on all Public and Bank Holidays.

For help and advice on the information you need to put on the form or about the benefit you want to claim, contact the office that deals with the benefit.

## We would like your feedback about this PDF claim form

We would like your feedback about this form. We will use any comments to improve future versions. Please email your comments to:

**[forms.feedback@dwp.gsi.gov.uk](mailto:forms.feedback@dwp.gsi.gov.uk)**

# State Pension Forecast

## Who can get a State Pension forecast

You can get a State Pension forecast if you are more than 30 days away from State Pension age when we process your application. It will take an average of 10 working days to prepare your forecast from the date we receive your application form.

## Completing the form

If you need any help, please phone us on **0845 3000 168** (if you live in the UK) or **+44 191 218 3600** (if you live outside the UK), or write to us at:

**Future Pension Centre  
The Pension Service  
Tyneview Park  
Whitley Road  
Newcastle upon Tyne  
NE98 1BA  
United Kingdom**

## Other ways to get a State Pension forecast

**If you live in the UK you can get a forecast:**

- online by visiting the website **[www.direct.gov.uk/pensionforecast](http://www.direct.gov.uk/pensionforecast)** and following the State Pension Forecasting links.
- by calling the Future Pension Centre and we will take your application over the phone. Our phone number is **0845 3000 168**. Our opening hours are Monday to Friday 8am to 8pm. For security and quality purposes your call may be monitored and recorded. If you have speech or hearing difficulties you can call us using a textphone on **0845 3000 169**. Or you can use Text Relay by dialling **18001 0845 3000 168**.

**If you live outside the UK**

You can call us at the Future Pension Centre by dialling **+44 191 2183600** and we will take your application over the phone. Lines are open 8am to 5pm Monday to Friday. For security and quality purposes your call may be monitored and recorded. If you have speech or hearing difficulties you can call us using a textphone on **+44 191 2182051**.

## What your State Pension forecast will tell you

Your forecast will give you, using today's values, estimates of the basic and additional State Pension (and Graduated Retirement Benefit if appropriate) that you may get at State Pension age, based on:

- your National Insurance (NI) contributions so far, and
- what we expect your future NI contributions to be.

Your forecast will also tell you if there is anything you can do to improve your basic State Pension. If you have little or no basic State Pension and you have a spouse or civil partner, you may be able to get a basic State Pension based on their NI contributions.

Your forecast will be based on your own NI contributions record unless:

- at the time the forecast is prepared you were widowed, or your civil partner had died, and you had given us details of your late husband, late wife, or late civil partner, or
- at the time the forecast is prepared you were divorced or had your civil partnership dissolved, and you had given us details of your ex-husband, ex-wife, or former civil partner.

If you are divorced or your civil partnership has been dissolved, your forecast may also tell you the amount of any additional State Pension gained or lost as a result of any pension sharing order made by the Court during your divorce or dissolution proceedings.

If you have a spouse or civil partner, your forecast does not include details of any State Pension they may receive.

## Sending your forecast to someone else

Our records are strictly confidential and we cannot send your forecast to someone else unless they are authorised to act on your behalf (for example, they have Power of Attorney) or we have your permission in writing. If your representative is authorised to act on your behalf we need to see proof of that authority before we can send your forecast to them. If you would like us to send your forecast to someone else, please tick the box in **Part 9** and fill in **Part 10**.

## Tracing a lost occupational or personal pension

### The Pension Tracing Service

It's easy to lose contact with a previous employer and their pension scheme if, for example, you have changed jobs several times. If you think you have one or more old company or personal pensions, but you don't know the full details, contact the Pension Tracing Service. If you can give details of the company who you worked for, or the provider you had your pension(s) with, the Pension Tracing Service may be able to give you the scheme's contact details. You do not have to pay for this service. Once you have the contact details, you can ask the pension provider to check whether you have a pension with them.

You can contact the Pension Tracing Service by:

- phoning **0845 600 2537** (lines are open from 8am to 6pm Monday to Friday). If you are calling from outside the UK, the phone number is **+44 191 2154491**
- textphone on **0845 3000 169**. Or you can use Text Relay by dialling **18001 0845 600 2537**. These numbers are not available for customers who are calling from outside the UK.
- going to the website at **[www.direct.gov.uk/pensions](http://www.direct.gov.uk/pensions)**
- writing to:  
The Pension Tracing Service  
Tyneview Park  
Whitley Road  
Newcastle upon Tyne  
NE98 1BA  
United Kingdom

## Claiming State Pension

**You cannot use this form to claim your State Pension.**

To find out how to claim your State Pension go to **[www.direct.gov.uk/pensions](http://www.direct.gov.uk/pensions)**

However, further information will be sent to you with your forecast.

## How we collect and use information

The information we collect about you and how we use it depends mainly on the reason for your business with us. But we may use it for any of the Department's purposes, which include:

- social security benefits and allowances
- child support
- employment and training
- private pensions policy, and
- retirement planning.

We may get information from others to check the information you give to us and to improve our services. We may give information to other organisations as the law allows, for example to protect against crime.

To find out more about how we use information, visit our website

**[www.dwp.gov.uk/privacy-policy](http://www.dwp.gov.uk/privacy-policy)** or contact any of our offices.

# State Pension Forecast

## ● Application for a State Pension forecast

### ○ Part 1 About you

Please tell us about yourself. Use BLOCK CAPITALS.

Letters Numbers

Letter

**National Insurance (NI)  
number**

**Current surname or family  
name**

**First name and any middle  
names**

**Any other surnames or family  
names you have previously  
been known by**

**Full address including  
postcode or zip code**

**Correspondence address**  
if different. Give us the full  
address, including the  
postcode or zip code.

**If you are living outside the  
UK now, please give us full  
details of your last two UK  
addresses, including  
postcodes**

Address 1

Postcode

Address 2

Postcode

**Date of birth**

**DD/MM/YYYY**

# ● Application for a State Pension forecast continued

## ○ Part 2 Marital status

Please tick the description that applies to you and give exact dates. If you do not know exact dates, we can still give you a forecast but it will be based only on your own NI contributions. If you are no longer married or in a civil partnership we will ask you for more information later in the form.

Single

Married Date of marriage DD/MM/YYYY

Civil partner Date of formation of civil partnership DD/MM/YYYY

Divorced Date of divorce DD/MM/YYYY

Civil partnership dissolved Date of dissolution DD/MM/YYYY

Widowed Date you were widowed DD/MM/YYYY

Surviving civil partner Date your civil partner died DD/MM/YYYY

Marriage annulled Date of annulment DD/MM/YYYY  
Please send your certificate of annulment

Civil partnership annulled Date of annulment DD/MM/YYYY  
Please send your certificate of annulment

## ○ Part 3 Contact details

**If we need to contact you before we send you your forecast, how would you prefer us to get in touch with you?**

By letter to the address given in Part 1

By phone. Please give number below

Home phone number Code Number

Daytime phone number, if different Code Number Ext

What is this number? Work Mobile Textphone

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**If you live in Wales, we can send your forecast in English or Welsh. Which language do you prefer?**  
English  
Welsh

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**We can send you information in braille or large print.**  
Braille  
Large print

Please tick the box if you prefer one of these choices.

# ● Application for a State Pension forecast continued

## ○ Part 4 What you are doing now

Please tick **all** the boxes that describe what you are doing now.

- |   |  |
|---|--|
| <b>a Working for an employer</b>                                | <b>g Registered for Jobseeker's Allowance</b>                                    |
| <b>b Working for an employer and getting Working Tax Credit</b> | <b>h Getting Incapacity Benefit</b>  |
| <b>c Self-employed</b>  | <b>i Getting Employment and Support Allowance</b>                                |
| <b>d Self-employed and getting Working Tax Credit</b>           | <b>j Getting Carer's Allowance</b><br>previously known as Invalid Care Allowance |
| <b>e Not working</b>  | <b>k Getting Severe Disablement Allowance</b>                                    |
| <b>f Getting Statutory Sick Pay</b>                             |  |

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### About NI contributions

If you have ticked any of the boxes **a** to **d** shown above, we need to know about the NI contributions you are paying.

If you can improve your basic State Pension by paying Class 3 voluntary NI contributions, we will tell you about this in your forecast.

Please tick **all** the boxes that apply to you.

**Paying full-rate United Kingdom (UK) NI contributions**

**Paying Class 2 self-employed NI contributions**

**Paying married woman's or widow's reduced-rate NI contributions**

**Paying Class 3 voluntary NI contributions**

**Not paying NI contributions**

**If you are working for a UK employer, please tell us your current earnings before tax and National Insurance.**

£

Each week

Each month

Each year

# ● Application for a State Pension forecast continued

## ○ Part 5 Living outside the United Kingdom (UK)

We use *United Kingdom (UK)* to mean England, Scotland, Wales and Northern Ireland. If you have not lived outside the UK please go to **Part 6**.

**If you have lived outside the UK at any time since the age of 16**, please tell us where you have been. Do not include holidays or periods served in HM forces.

Please tick the boxes that apply to you.

**Australia** – please give dates. from **DD/MM/YYYY** to **DD/MM/YYYY**  
Australia is the only country we need exact dates for.

**Canada**

**New Zealand**

**Any other country** Which countries?

If you are currently living outside the UK, please provide details of the country you are living in and when you went to live there:

**Country**

**From** **DD/MM/YYYY**

**What date did you leave the UK?** **DD/MM/YYYY**

## ○ Part 6 Widowed or a surviving civil partner?

If this does not apply to you, please go to **Part 7**.

If you are currently widowed or a surviving civil partner, please tick the boxes that apply to you.

**Are you getting or did you get**

**Widow's Benefit or bereavement benefits**

**War Widow's Pension**

**War Widower's Pension**

**Industrial Death Benefit** How much Industrial Death Benefit do you get each week?  
£

Please also tell us if

**You were getting bereavement benefits which have now stopped**

**You have voluntarily given up your entitlement to Widow's Benefit**

**You are currently disqualified from getting Widow's Benefit**

# ● Application for a State Pension forecast continued

## ○ Part 7 Extra information

We can also tell you what may happen to your State Pension in different situations. If you want extra information in your forecast, please tick the things you want to know about. If not, go to **Part 8**.

**If you put off claiming your State Pension**

Please tell us the date when you may want to start claiming your State Pension

DD/MM/YYYY

**If you stop work before you reach State Pension age**

Please tell us the date you may stop working

DD/MM/YYYY

**If you currently live in the UK but may go to live outside the UK**

Please tell us the country you may go to

**If your annual earnings change**  
Do not include pension income

Please tell us what they might change to

£

**If you are married or a civil partner but are about to get divorced or dissolve your civil partnership**

Please tell us your expected date of divorce or dissolution

DD/MM/YYYY

## ○ Part 8 Former marital or civil partner status

Only fill in this part if

- you are widowed or a surviving civil partner
- you are divorced or your civil partnership has been dissolved
- you are about to be divorced or have your civil partnership dissolved, or
- your marriage or civil partnership has been annulled.

If this does not apply to you, or it does but you would like us to provide you with a forecast based on your own NI contributions only, please go to **Part 9**.

**Do not fill in this part if you have since remarried or formed a new civil partnership.**

Please give as much information as you can to help us trace your last spouse or civil partner's NI contribution record.

**We will not contact your former spouse or civil partner.** Any information you give us about them will only be used to trace their NI contribution record.

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	Letters	Numbers	Letter
<b>Your ex or late spouse's or former or late civil partner's NI number</b>			
<b>Their full name</b>			
<b>Their date of birth</b>		DD/MM/YYYY	
<b>Please tell us their last two addresses in the UK if you know them</b>			
		Postcode	
<b>Date you married or formed a civil partnership</b>		DD/MM/YYYY	



# ● Application for a State Pension forecast continued

## ○ Part 9 What to do now

### Where do you want your forecast sent?

Please tick the box that applies to you.

To me at the address I have given in **Part 1**

Please go to **Part 11**.

To my representative.  
I want my representative to handle any follow-up enquiries that relate to my State Pension forecast

Please go to **Part 10**.

## Where to send the form

Please send the form to the address below.

State Pension Forecasting Team  
The Pension Service  
Tyneview Park  
Whitley Road  
Newcastle upon Tyne  
NE98 1BA.

Please note that

- this authorisation relates only to enquiries made to the Future Pension Centre, and
- we can only provide information to your representative for the period that your forecast is held on our computer records.

If you request another forecast in the future, you would need to provide further authorisation for us to provide/discuss that forecast with your representative.

I am a Personal Acting Body.  
Send the forecast to me

Please go to **Part 10**.  
Please provide proof of your authority, for example, power of attorney.

## ○ Part 10 Your representative

Please give details of your representative.

If you are a Personal Acting Body, please give your name and address.

**Surname or family name**

**Other names**

**Organisation's name**

if this applies

**Full address including  
postcode or zip code**

**Daytime phone number**

Code

Number

Ext

**Fax number**

Code

Number

**Reference number**

if you know it

Please go to **Part 11**.

## ○ Part 11 Signature

Please sign and date this form.

**Signature**

**Date**

DD/MM/YYYY