



### Introduction

South Tyneside Council is the administering authority for the Tyne and Wear Pension Fund ('The Fund'). The Fund is responsible for making payments in respect of retirements, beneficiary pensions and death grants. There are several factors involved when calculating payments, and the Fund is required to keep accurate data to ensure the calculations are correct. This data includes date of birth and marital status. As part of the Fund's due diligence checks, documentation and other relevant information will be requested at the time of payment.

### Purpose

1. The Fund is required to confirm age and marital status or civil partnership in order to correctly calculate and pay benefits.
2. In order for a death grant lump sum payment to be made, the Fund requires the beneficiary to prove their identity and current address.
3. The policy outlines the documentation which can be provided by individuals in order to prove their age, marital status, identity or address.

### Provision of Documentation

4. Before a benefit can be paid to a member or beneficiary, the Fund requires sight of the following documents, depending on the type of payment:

Type of payment	Documentation accepted
Retirement Pension	One of the following:-  Birth certificate Passport Driving licence  Members can scan or photograph their documents and upload to their mypension account. If sending the document by post, clear photocopies will be accepted.
Beneficiary Pension	One of the following:-  Marriage certificate Civil partnership certificate  Clear paper photocopies will be accepted.
Childs Pension	One of the following:-  Full birth certificate Adoption certificate  Clear paper photocopies will be accepted.

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Death Grant Lump Sum	One of the following:-  Birth Certificate Passport Driving licence A utility bill clearly showing the address A bank statement clearly showing the address A council tax bill clearly showing the address  Clear paper photocopies will be accepted.
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5. Members may need to provide certificates and / or proof of identification for pension calculations where payments are not being made. The Fund will accept clear photocopies in these circumstances.
6. Members are able to upload documents to their mypension accounts, including scanned or photographed forms of identification. Original certificates/documentation and clear photocopies are also accepted.
7. Documentation supplied by a third party or next of kin should be sent by post. Original certificates/documentation and clear photocopies are accepted.

**Discretion**

7. If members are unable to provide the requested documentation, in exceptional circumstances, the Fund **may** use its discretion and accept another form of identification.
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