



INSTRUCTIONS AND IMPORTANT INFORMATION FOR COMPLETING FORM PENS.E/2-A

PAYMENT INSTRUCTIONS FOR A DISABILITY BENEFIT under article 33 of the UNJSPF Regulations

PURPOSE OF FORM PENS.E/2-A

A disability benefit is payable if you are deemed by the Staff Pension Committee of your employing organization to be incapacitated for further service in a position that is reasonably compatible with your abilities and if the illness or injury is likely to be permanent or of long duration.

Once a disability benefit has been awarded by the Staff Pension Committee of your employing organization, you should use the form to receive payment from the Fund. If a child's benefit is payable, it will be paid to the account of the main beneficiary.

IMPORTANT NOTES

Please do not fill out form PENS.E/2-A until you have read the notes below

This information is provided to assist you in completing form PENS.E/2-A. If there is any ambiguity, inconsistency or conflict between the information herein and the UNJSPF Regulations, Rules and Pension Adjustment System, the Regulations, Rules and Pension Adjustment System shall prevail.

Before completing the form, please read article 33 of the UNJSPF Regulations, available at www.unjspf.org/resources/regulations-and-rules.

Please note that a disability benefit cannot be commuted into a lump sum, either in whole or in part, at any time. If, however, you have reached early retirement age at the time you become disabled and have at least 5 years of contributory service, you may choose to receive an early retirement benefit (in which case you might be entitled to a lump-sum commutation) rather than to be considered for a disability benefit. Please note, however, that if you elect an early retirement benefit, a reduction factor for life would be applied to your benefit. The extent of the reduction depends on your age at the time of separation and the length of your contributory service. Furthermore, the payment of a child's benefit for children who are under the age of 21 will commence only when you reach normal retirement age and only for those children who will be under the age of 21 at that time. Once you have made your election, you should inform your Human Resources Office whether you have decided to elect an early retirement benefit or a disability benefit so that your separation can be processed accordingly. Your choice of benefit may affect your separation entitlements and eligibility for after-service health insurance. You can obtain estimates from the Staff Pension Committee of your employing organization or UNJSPF of the amounts payable under each type of benefit.

Please visit the UNJSPF dedicated web page on disability benefit, where you can find useful guidance and resources, including a booklet in which the principles and conditions applicable are explained, available at www.unjspf.org/for-clients/disability-benefit.

INSTRUCTIONS

Please do not fill out form PENS.E/2-A until you have read the instructions below

Please type or print the information in BLOCK LETTERS when filling in the form. All pages must be dated and signed.

SECTION 1: PARTICIPANT INFORMATION

Please provide your Unique Identification number (UID), full name, date of birth and contact information. If you do not know your Unique Identification number, you can request it by sending an email from your work email address to requestUIDOnly@unjspf.org. For further details, please consult www.unjspf.org/for-clients/unique-identification-number/.

Your pension number can be found on your pension statement or in the welcome letter from UNJSPF.

The personal data to be provided in this section are required to assist UNJSPF in validating your identity.

SECTION 2: BANK ACCOUNT INFORMATION

1. Payee name

Please specify the payee name, which should match the name on your bank statement. Payment can only be made to an account in your name or to a joint account that is also held in your name. Payment cannot be remitted via cheque to a mailing address, nor can it be made to a third party.

2. Name of bank or financial institution

Please provide the name of the bank or financial institution where your account is held. Please note that payment can only be made to a bank or financial institution. Payment cannot be remitted to non-banking institutions or money transfer agencies or to other third parties. Monthly benefits are paid into one account only. It is not possible to request that the payment be split.

If your account is held at an institution, such as a **brokerage firm (individual retirement account)**, **UNESCO SEPU**, **AMFIE/AMFI** or **UNSSCA**, you should also complete "10. Additional bank account information".

3. Beneficiary account number and/or IBAN

This number is used to identify your personal account. Please refer to the "Banking requirements" table below for the account number requirements.

4. Bank ID code (SWIFT code, ACH routing number, sort code, transit number, IFSC, BSB number, NCC, etc.)

Please refer to the "Banking requirements" table below for the bank ID code requirements.

5. Currency of payment

Please specify the currency of payment. The default currency of payment is the United States dollar. However, periodic benefit payments may also be paid in the following currencies: AUD, CAD, CHF, CLP, DKK, EUR, GBP, INR, JPY, NOK, NZD, PEN, PKR, RUB, SEK, SGD, XAF and XOF. In such cases, the UNJSPF quarterly exchange rate will be applied.

You may therefore request payment in any of these currencies and to any bank of your choice, regardless of your country of residence.

6. Name of branch

Please provide the name of the bank branch, if applicable.

7. Account type

For banks located in the United States of America, you should indicate whether your account is a checking or savings account.

8. Bank address

You should provide the complete address of your bank or financial institution. It is preferable to provide a street address rather than a PO Box address.

9. Intermediary or correspondent bank

Intermediary or correspondent banks are often used when a payment is made in a currency that is different from the local currency (e.g. if payment is made in United States dollars to an account held in France). Please refer to the "Banking requirements" table below for any intermediary or correspondent bank requirements.

Any intermediary or correspondent bank fees shall be incurred by you. UNJSPF is only liable for paying the remitting bank fees.

10. Additional bank account information

Please provide this information if your account is held at an institution, such as a **brokerage firm (individual retirement account)**, **UNESCO USLS**, **AMFIE/AMFI** or **UNSSCA**. Please refer to the "Banking requirements" table below for any other information requirements.

11. Other information

Please provide any additional information that may be required by UNJSPF. Please refer to the "Banking requirements" table below for any other information requirements.

SECTION 3: EMERGENCY CONTACT

Please provide the details of your emergency contact, for use by UNJSPF ONLY when all efforts to reach you through normal channels fail.

SECTION 4: ACKNOWLEDGEMENT AND SIGNATURE

The form must be completed in full, dated and signed to be valid.

Please also submit the following supporting documents, as applicable:

- (1) A copy of a valid Government-issued photo ID showing your full name, date of birth and scripted signature.
- (2) A recently dated bank statement and/or a bank document, such as a voided cheque, showing your name and account number, which should match the information that you provide in the payment instructions, as well as in the Fund's records.
- (3) A copy of your spouse's official Government-issued ID, such as a valid passport or driving licence, showing his or her name, signature and date of birth (or a copy of your spouse's birth certificate).
- (4) Copies of the birth certificates of any children below the age of 21 and any disabled children over the age of 21.
- (5) A copy of your marriage certificate.
- (6) A copy of any divorce decree(s) for any previous marriage(s).

HOW TO SUBMIT FORM PENS.E/2-A

The dated and hand-signed form must be returned to the secretary of your Staff Pension Committee or to UNJSPF if you are a staff member of the United Nations family, for example the United Nations Secretariat, UNDP, UNFPA, UNHCR or UNICEF.

Most registered users of the member self-service (MSS) can submit UNJSPF forms and other documentation electronically to UNJSPF under the “MSS Document Upload” tab of their MSS account. Users must download the relevant UNJSPF form under the “E-Forms” tab and complete, print, date and hand sign it. Then they must scan the form and upload it, either in JPG, JPEG or PDF format, and send it to UNJSPF. Once the form has been successfully submitted, there is **NO NEED** to submit a physical version of the form to UNJSPF. Go to the “About member self-service (MSS)” web page, available at www.unjspf.org/resources/about-member-self-service, for a tutorial on how to upload documents using MSS.

Please note that access to the “MSS Document Upload” tab may be restricted, at the request of some UNJSPF member organizations. In such cases, the staff of such organizations will not see the “MSS Document Upload” tab as one of the menu options. In any case, all participants should first check with their employing organization to ascertain the correct process for submitting documents to UNJSPF.

You can also mail the physical form, which must be duly completed, dated and hand-signed, directly to UNJSPF at any of the addresses below:

If documents are sent by regular postal mail to the New York Office	If documents are sent by express courier (e.g. DHL) or registered mail to the New York Office	If documents are sent to the Geneva Office (by either postal mail or express courier)
United Nations Joint Staff Pension Fund c/o United Nations PO Box 5036, New York, NY 10163-5036 United States of America	United Nations Joint Staff Pension Fund 37th floor, 1 DHP 885 Second Avenue, New York, NY 10017 United States of America	United Nations Joint Staff Pension Fund s/c Palais des Nations 1211 Genève 10 Suisse

BANKING REQUIREMENTS

KEY TERMS

IBAN – The International Bank Account Number is an internationally agreed standard for identifying an individual’s account at a financial institution. It consists of a two-letter ISO country code, followed by two check digits and up to 30 alphanumeric characters for the Basic Bank Account Number.

SWIFT code – The SWIFT code is a Business Identifier Code used by banks and payment providers when making international transfers.

To utilize the table, please identify your currency of payment and bank location.

Currency of payment (section 2.5)	Bank location (section 2.2, 2.8)	Beneficiary account number requirements (section 2.3)	Bank ID code requirements (section 2.4)	Intermediary or correspondent bank (section 2.9)/Other information (section 2.11)
USD	United Nations Federal Credit Union (UNFCU)	11 or 13 digits	226078609	-
USD	UNITED STATES	Up to 17 digits	9-digit Automated Clearing House (ACH) routing number	-
USD	Standard Chartered Bank, INDIA	11 digits	SCBLINBB	-
USD	Standard Chartered Bank, PAKISTAN	11 digits	SCBLPKKK	-
USD	CHILE	Up to 15 digits	SWIFT code (8 or 11 characters)	(Section 2.11) 8- or 9-digit tax ID (RUT) number
USD	PERU	20-digit Código de Cuenta Interbancaria (CCI)	SWIFT code (8 or 11 characters)	-
USD	Outside UNITED STATES	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
EUR	SEPA ZONE or EUROZONE	IBAN - format based on country of remittance	SWIFT code (8 or 11 characters)	-
EUR	Outside SEPA ZONE or EUROZONE	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank

(table continued)

Currency of payment (section 2.5)	Bank location (section 2.2, 2.8)	Beneficiary account number requirements (section 2.3)	Bank ID code requirements (section 2.4)	Intermediary or correspondent bank (section 2.9)/Other information (section 2.11)
CHF	SWITZERLAND	IBAN - 21 characters starting with CH	SWIFT code (8 or 11 characters)	-
CHF	Outside SWITZERLAND	IBAN - format based on country of remittance	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
AUD	AUSTRALIA	Up to 9 digits	6-digit Bank State Branch (BSB) number in 000-000 format	-
AUD	Outside AUSTRALIA	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
CAD	CANADA	Up to 16 digits	9-digit transit number	-
CAD	Outside CANADA	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
CLP	CHILE	Up to 15 digits	SWIFT code (8 or 11 characters)	(Section 2.11) 8- or 9-digit tax ID (RUT) number
DKK	DENMARK	IBAN - 18 characters starting with DK	SWIFT code (8 or 11 characters)	-
GBP	UNITED KINGDOM	8 to 10 digits	6-digit sort code	-
GBP	Outside UNITED KINGDOM	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
INR	Standard Chartered Bank, INDIA	11 digits	SCBLINBB	-
INR	INDIA	No specific requirement	11 alphanumeric characters Indian Financial System Code (IFSC)	-
JPY	JAPAN	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.11) 7-digit Zengin code
JPY	Outside JAPAN	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
NOK	NORWAY	IBAN - 15 characters starting with NO	SWIFT code (8 or 11 characters)	-
NZD	NEW ZEALAND	12 digits in 00000000-000 format, leading zeros may be added	6-digit National Clearing Code (NCC) in 00-0000 format	-
NZD	Outside NEW ZEALAND	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.9) Intermediary or correspondent bank
PEN	PERU	20-digit Código de Cuenta Interbancaria (CCI)	SWIFT code (8 or 11 characters)	
PKR	Standard Chartered Bank, PAKISTAN	11 digits	SCBLPKKK	-
PKR	PAKISTAN	No specific requirement	SWIFT code (8 or 11 characters)	(Section 2.11) Inter-Bank Funds Transfer (IBFT)
RUB	RUSSIAN FEDERATION	20 digits	SWIFT code (8 or 11 characters)	(Section 2.1) full name as it appears on your bank statement, including your patronymic name. (Section 2.4) 9-digit bank ID code (BIK) (Section 2.11) 12-digit tax ID (INN) number
SEK	SWEDEN	IBAN - 24 characters starting with SE	SWIFT code (8 or 11 characters)	-
SGD	SINGAPORE	No specific requirement	SWIFT code (8 or 11 characters)	-
XAF	Central African Economic and Monetary Community (CEMAC)	23 digits	SWIFT code (8 or 11 characters)	-
XOF	West African Economic and Monetary Union (WAEMU/UEMOA)	24 alphanumeric characters	SWIFT code (8 or 11 characters)	-