



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

PAYMENT INSTRUCTIONS FOR SURVIVORS' BENEFITS

PURPOSE OF FORM PENS.E/2-B

If you are a surviving spouse, divorced surviving spouse, spouse married after separation, child or secondary dependant of the deceased UNJSPF participant or retiree, you may be eligible for a benefit payable under the UNJSPF Regulations, Rules and Pension Adjustment System.

The form **should** be used to **request** the payment of your benefit.

IMPORTANT NOTES

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

The information provided below is subject to change. For updated information, please refer to www.unjspf.org/for-clients/survivors-benefit.

Please note that it is important to inform the Fund of the death of a participant, retiree or beneficiary as soon as possible.

For active participants, it is the responsibility of their employing organization to inform the Fund of the death.

For retirees and beneficiaries, the quickest way to notify the Fund of the death is by sending an email to unjspf-deathrelated@un.org. Alternatively, the notifier may contact the Fund at any of the telephone numbers or addresses provided on the Fund's website or by submitting a message using the contact form, available at www.unjspf.org/contact-us.

Communications relating to the death of a retiree or beneficiary are given priority by UNJSPF.

More information on contacting the Fund for urgent assistance can be found at www.unjspf.org/emergency.

Below are the different types of survivors' benefits under the UNJSPF Regulations.

Surviving spouse's benefit (article 34)

This benefit is payable to:

- (a) The surviving spouse of a retiree who was entitled to a retirement, early retirement, deferred retirement or disability benefit, if the surviving spouse was married to the retiree at the date of separation from service and remained married to him or her until the date of death;
- (b) The surviving spouse of a participant who died in service, if the surviving spouse was married to the participant at the date of death in service.

Divorced surviving spouse's benefit (article 35 bis)

The divorced surviving spouse's benefit is payable if:

- (a) The participant died in service or was entitled to a retirement, early retirement, deferred retirement or disability benefit at the date of his or her death;
- (b) The participant had been married to the former spouse for a continuous period of at least 10 years, during which contributions were paid to the Fund on account of the participant or the participant was awarded a disability benefit under article 33 of the UNJSPF Regulations;
- (c) The participant's death occurred within 15 years of the date when the divorce became final, unless the former spouse proves that at the time of death the participant was under a legal obligation to pay maintenance to the former spouse;
- (d) The former spouse has reached the age of 40 years old;
- (e) Evidence is provided that a divorce settlement does not have an express renouncement of UNJSPF pension benefit entitlements.

Spouse married after separation (article 35 ter)

A spouse married after separation is not eligible to receive a widow's or widower's benefit unless the retiree or the recipient of a disability benefit previously elected to provide a periodic benefit for life to that spouse by purchasing an annuity within one year of the marriage.

Child's benefit (article 36)

A child's benefit is payable to a surviving child if:

- (a) The participant died in service. The child benefit is payable if the child is under the age of 21 at the time of the death;
- (b) The retiree or beneficiary dies. The child benefit is payable if:
 - (i) The deceased participant was entitled to a normal retirement, early retirement or disability benefit;
 - (ii) The child is under the age of 21 at the time of the death;
- (c) The child is disabled. If the child is disabled, a monthly benefit may be payable also after the age of 21.

Secondary dependant's benefit (article 37)

A secondary dependant's benefit is payable to not more than **one** surviving secondary dependant, in the case of the death of a participant in service or during entitlement to a retirement, early retirement, deferred retirement or disability benefit, provided no benefit is or was payable to a child or to a surviving spouse, including a divorced spouse, of the participant. A secondary dependant could be a parent or a sibling.

This information is provided to assist you in completing form PENS.E/2-B. 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.

INSTRUCTIONS

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

Before completing the form, please read the relevant articles of the UNJSPF Regulations on survivors' benefits, available at www.unjspf.org/resources/regulations-and-rules.

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

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

SECTION 1: DECEASED PARTICIPANT OR RETIREE INFORMATION

Please provide the deceased participant's or retiree's Unique Identification number (UID) and full name. If you do not know the Unique Identification number, please send an email to requestUIDOnly@unjspf.org.

For further details, please consult www.unjspf.org/for-clients/unique-identification-number.

The pension number field is optional on the form. This number can be found on the deceased participant's pension statement or welcome letter and benefit letter from UNJSPF.

SECTION 2: SURVIVOR 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, please send an email to requestUIDOnly@unjspf.org.

For further details, please consult www.unjspf.org/for-clients/unique-identification-number/.

SECTION 3: APPOINTED LEGAL GUARDIAN INFORMATION

Please provide the full name and contact information of the appointed legal guardian, where applicable. If the child is unable to manage his or her financial affairs, the Fund's policy requires that a legal guardian be appointed. For more information and the requirements, please refer to www.unjspf.org/for-clients/legal-guardianship-and-estate. This section should be completed **only** if a legal guardian has been appointed.

SECTION 4: TYPE OF BENEFIT(S) DUE UNDER THE UNJSPF REGULATIONS

Please select the type of benefit(s) due under the UNJSPF Regulations.

SECTION 5: 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.

Your periodic benefit payment can be paid in any of the 18 currencies, regardless of your elected country of residence, under the two-track system. For more information on the two-track system, see <https://www.unjspf.org/for-clients/two-track-pension-adjustment-system>.

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 type 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 6: 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 7: ACKNOWLEDGEMENT AND SIGNATURE

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

Please also submit the following documents with this form:

- (1) A copy of the participant’s death certificate, if not already provided.
- (2) A copy of a valid Government-issued photo ID showing your full name, date of birth and scripted signature.
- (3) 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.
- (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).

SECTION 8: SIGNATURE AUTHENTICATION

For UNJSPF to accept your signature as duly authenticated, you must affix your signature and the date in the presence of an authenticating official (e.g. a United Nations official, government official or notary public). The person authenticating your signature must complete all fields in this section: printed full name; email address; official title, licence or index number; original ink signature; authentication date (which must match the date you are signing the form); and official stamp/seal of office. For further information, please refer to www.unjspf.org/for-clients/authentication-of-signatures-documents.

HOW TO SUBMIT FORM PENS.E/2-B

In the event of death in service, the dated and hand-signed form must be returned to the secretary of the Staff Pension Committee of the deceased staff member. In the case of death after service, or if you are a surviving spouse, divorced surviving spouse, spouse married after separation, child or secondary dependant of the deceased staff member of the United Nations family, for example the United Nations Secretariat, UNDP, UNFPA, UNHCR or UNICEF, the dated and hand-signed form must be returned directly to UNJSPF.

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 5.5)	Bank location (section 5.2, 5.8)	Beneficiary account number requirements (section 5.3)	Bank ID code requirements (section 5.4)	Intermediary or correspondent bank (section 5.9)/Other information (section 5.11)
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 5.11) 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 5.9) Intermediary or correspondent bank
EUR	SEPA ZONE or EUROZONE	IBAN - format based on country of remittance	SWIFT code (8 or 11 characters)	-

(table continued)

Currency of payment (section 5.5)	Bank location (section 5.2, 5.8)	Beneficiary account number requirements (section 5.3)	Bank ID code requirements (section 5.4)	Intermediary or correspondent bank (section 5.9)/Other information (section 5.11)
EUR	Outside SEPA ZONE or EUROZONE	No specific requirement	SWIFT code (8 or 11 characters)	(Section 5.9) Intermediary or correspondent bank
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 5.9) 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 5.9) 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 5.9) Intermediary or correspondent bank
CLP	CHILE	Up to 15 digits	SWIFT code (8 or 11 characters)	(Section 5.11) 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 5.9) 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 5.11) 7-digit Zengin code
JPY	Outside JAPAN	No specific requirement	SWIFT code (8 or 11 characters)	(Section 5.9) 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 5.9) 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 5.11) Inter-Bank Funds Transfer (IBFT)
RUB	RUSSIAN FEDERATION	20 digits	SWIFT code (8 or 11 characters)	(Section 5.1) full name as it appears on your bank statement, including your patronymic name. (Section 5.4) 9-digit bank ID code (BIK) (Section 5.11) 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)	-