INSTRUCTIONS FOR COMPLETING APPENDIX U (Residence and employment abroad)

Please complete this form if you have lived or worked outside Finland and you are applying for:
- an earnings-related pension or national pension from Finland or
- a pension provided on a statutory basis from an EU/EEA country or from Switzerland, the United States, Australia, Chile, Israel or Canada.

Pensions provided on a non-statutory basis must be claimed separately from the relevant pension provider.

If you apply for a survivor’s pension, complete one form about the deceased person who lived or worked abroad and one form each about all applicants of survivor’s pension who have lived or worked abroad (surviving spouse and child).

Pension benefits are typically accrued from employment. In some countries, pension benefits may also be accrued solely by virtue of periods of residence or the payment of contributions, or on the basis of spousal insurance or the care of dependent children.

Enclose copies of all documents proving your residence abroad. This includes employment contracts, job references, certificates of student status, letters of appointment, records of employment or maritime employment, and passports. Further examples of such documents include decisions and certificates related to insurance coverage abroad and decisions indicating the refund of contribution payments. Pension providers in countries including Estonia, Latvia and Lithuania require certified copies of records of employment and associated appendixes. Pension providers in Greece require original copies of any enclosed documents.

How to complete the form:

1 Applicant / Deceased
If you complete the form on behalf of the person applying for a survivor’s pension, write the applicant’s name and personal identity code. Tick the appropriate box to indicate whether the information concerns the deceased person or the applicant.

2 Residence and employment in EU/EEA countries and countries with a social security agreement with Finland

EU/EEA countries: Austria, Belgium, Bulgaria, Croatia, Cyprus (the Greek Cypriot area), the Czech Republic, Denmark, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom of Great Britain and Northern Ireland.

Switzerland is equated with EU countries based on an agreement with the European Union.

Countries that have a social security agreement with Finland: The United States of America, Australia, Chile, Israel and Canada (including the Province of Quebec).

2.1 – 2.2 Period of and reason for residence abroad
List, in as much detail as you can, any periods you have spent abroad. Tick the appropriate box to indicate the reason for your residence and indicate the corresponding periods of foreign residence. If you have spent several periods in a particular country but for different reasons, provide the information separately for each period. For example, if your reasons for residence abroad include both employment and residence, the periods referred to may be the same, they may be overlapping, or they may be completely different. Tick the box marked ‘Residence’ if you have lived abroad as a family member. ‘Other reason’ refers for example to education. It is important to indicate the full period(s) that you have spent outside Finland. Write dates in the order of day, month and year (for example 23.5.2007). If you run out of space, you can continue in section 5 or use another Appendix U form.

2.3 Employment, education or other reason
If you have worked abroad, provide occupational details for each employment relationship (for example, nurse, sales manager, au pair, independent forest machine contractor), and the name and registered office or address of your employer, your company or the shipowner. If you have studied abroad, indicate the name of the educational institution you attended and the name of the degree completed or the field of study. If you worked while a student, also complete the section on employment.
2.4 Countries and localities
Indicate the countries and localities you have spent time in. If you have done maritime work, indicate the flag state of the ship on board of which you served.

2.5 Information about foreign pension insurance
Indicate your foreign pension provider or pension scheme (if known). Insurance number refers to the personal number given to you in another Nordic country or Estonia or the pension insurance number assigned by another country. Indicate under 'Type of insurance' whether participation in the insurance scheme was mandatory or voluntary.

2.6 Places of residence
Indicate your most recent address in each country or at least the city or town where you lived. This information is needed to forward your application to the right pension provider. Also indicate the Finnish municipality from which you moved abroad and the municipality to which you returned.

3 Residence and employment in other than EU/EEA countries or countries with a social security agreement with Finland
Applications for pension from other countries than those mentioned in section 2 or from an intergovernmental organization must be sent directly to the country or organization concerned. For addresses of foreign pension providers, contact the Department for International Pension Matters of the Finnish Centre for Pensions (tel. 029 411 2818).

Be sure to indicate any periods of residence spent in these countries in as much detail as possible. This information is needed to determine the total length of the time you have spent outside Finland.

4 Initial move to Finland
If you were born abroad, indicate here the date on which you first moved to Finland.

5 Additional information
Indicate here if you were covered by the Finnish social security system during a period of employment or residence abroad (e.g., that you received an E101 or A1 certificate as a posted worker or a decision from Kela). If you were abroad as a family member of a person employed or studying there, or are applying for pension on the basis of your spouse's insurance, indicate that person's or your spouse's name, date of birth and insurance number. If this form is not signed by the applicant, please explain here why it was signed by someone else.

6 Statement of consent
The amount of national pension that may be due to you is affected also by any pensions paid to you from abroad, unless provided otherwise in international agreements. For example, the supplementary pensions provided in Sweden under collective agreements (avtalspension/tjänstepension) affect the amount of the Finnish national pension. Such pensions provided on a non-statutory basis must be claimed directly from the relevant pension provider. Kela will assist as needed with the application process.

When you apply for a Finnish national pension, you may wish to give your consent for Kela to find out the amount of the pension or compensation you are applying for from abroad. If you do not give such consent, you must provide Kela with the following information: the payer of the pension or compensation, the start date of payment, the gross amount of the pension or compensation or, alternatively, a notification by the provider that you are not entitled to the pension or compensation in question. Your application for national pension cannot be processed until you have provided all required information. You may withdraw your consent at any time in writing.

7 Signature
Date and sign the form and provide your phone number for contact.