

LGPN 1

Pension Membership Form

The Nottinghamshire
Local Government Pension Scheme

administered by

 **Nottinghamshire
County Council**

for you, for now, for the future
lgps
2014

Highlights of the Local Government Pension Scheme (LGPS)

The LGPS gives you:

Secure benefits

The scheme provides you with a future income, independent of share prices and stock market fluctuations.

At a low cost to you

With tax-efficient savings and reduced National Insurance contributions (although this reduction is expected to be removed from April 2016).

And your employer pays in too

The scheme is provided by your employer who currently automatically pays the balance of the cost of providing your benefits in the LGPS.

Flexibility to pay more

You can boost your pension by paying more contributions. You get tax relief on these, too.

Options include Additional Pension Contributions (APCs) and Additional Voluntary Contributions (AVCs).

You can look forward to your retirement with the LGPS with:

A secure pension

Every scheme year (1 April to 31 March) an amount equal to a 49th of your pay in that year is added to your pension account. At the end of every scheme year the total pension in your account is adjusted to take into account the cost of living.

Tax-free cash

You have the option, when you draw your pension, to exchange part of it for some tax-free cash.

Peace of mind

Life cover from the moment you join the scheme, with a lump sum of 3 years pay being paid if you die in service, and cover for your family with a pension for your spouse, registered civil partner or cohabiting partner and for eligible children if you die in service or die after leaving with a pension entitlement.

Early retirement

You can choose to retire from age 55 and receive your benefits immediately, although they may be reduced for early payment. It's also possible to retire from age 55 and receive your benefits immediately if you are made redundant or retired in the interests of business efficiency.

Flexible retirement

From age 55, if you reduce your hours or move to a less senior position, provided your employer agrees, you can draw some or all of your benefits (although your benefits may be reduced for early payment), helping you ease into your retirement.

Further information can be found in our LGPEN12 Brief guide to the scheme which should accompany this form. If this hasn't been provided, you may request a copy from your employer. Alternatively it can be obtained from Notts LG Pensions Office.

July 2014



**Nottinghamshire
County Council**

The Nottinghamshire Local Government Pension Scheme

is administered by Nottinghamshire County Council

Notts LG Pensions Office, Business Support Centre, Nottinghamshire County Council
c/o County Hall, West Bridgford, Nottingham NG2 7QP
0115 977 2727 • nottspf.org.uk • lgpensions@nottsc.gov.uk

Pension Membership Form

LGPEN 1

To be completed by employees of Scheme Employers within Nottinghamshire County Council's Local Government Pension Fund who wish to be members of the Local Government Pension Scheme. Upon completion, please return to your employer.

Section A: Personal Details

Surname:

First name(s):

Title: Mr/Mrs/Miss/Ms/Other (please specify)

Male: Female:

Your home address:

Postcode:

Your National Insurance number:

Your date of birth:

Please enclose a copy of your Birth Certificate or relevant section of your passport

Your employer's name:

Your department:

Your personnel/pay number:

Marital Status:

- Single Married Divorced / Partnership Dissolved
 Widow/er Civil Partnership Eligible Co-habiting Partner #

Form LGPEN 14 is available for completion if you wish to notify us of your circumstances.

I understand that:

- as a new employee I have automatically been admitted to the Local Government Pension Scheme and I confirm that I am happy to remain a member, or
- as an existing employee I am electing to join the Local Government Pension Scheme at the earliest opportunity.

Signed:

Date:

Our pensions newsletter Nest Egg is produced twice a year. If you would like to be notified electronically when a new issue is available, please provide your email address below:

Please continue to page 4 – Declaration of other pension benefits and requests for transfers.
Upon completion, detach from the LGPEN 102 and return the remainder of the form to your employer

Declaration of other pension benefits and requests for transfers

Any request to transfer must be made within 12 months of joining the scheme (although this may be extended subject to the employer's and administering authority's discretion). Failure to request a transfer within the 12 month time limit may prejudice your future pension provision. For example, a transfer from a public sector (club) scheme, e.g. Teachers, NHS, Civil Service, may be treated as a non-public sector scheme (non-club) if it is transferred into the LGPS after 12 months. Different factors would therefore be used to calculate the transfer's value in the LGPS, possibly resulting in a lower pension credit.

Other Pension Benefits

In all cases

If you have previous Local Government Pension Scheme membership, please complete **Section B** (below), irrespective of whether or not you wish to consider a transfer.

If you are **within 12 months of joining**, a Transfer Request Form (LGPEN 102) should be completed and sent directly to any pension schemes (including any other LGPS funds) from which you would like to consider a transfer of pension rights. It is your responsibility to ensure they respond to your request and provide the information required in order for Notts LG Pensions Office to provide you with a quotation.

If you would like to consider multiple transfers, please photocopy the number of form LGPEN 102s required. Alternatively, further copies may be obtained from Notts LG Pensions Office.

If it is **more than 12 months** since you joined Notts LG Pension Fund in respect of your current employment, you would need your employer's consent before any potential pension transfer may be investigated. If you would like to consider a late transfer, please complete **Section C**. We will inform you of your employer's decision as to whether they will allow the transfer to progress and provide you with further instruction.

Section B: Previous Local Government Pension Scheme Membership

If you have any other membership within the Local Government Pension Scheme, please also complete the details below. This information is required irrespective as to whether or not you wish to consider a transfer. Attach extra sheets as necessary.

LGPS Pension Fund 1

Local Government Pension Fund:

Local Authority Employer:

Membership Dates: from: to:

The pension is: In Payment Deferred Benefit Deferred Refund

Would you like to consider a transfer to Notts Pension Fund? Yes → Complete the LGPEN 102 and forward directly to your previous Pension Fund
 No → No further action necessary

LGPS Pension Fund 2

Local Government Pension Fund:

Local Authority Employer:

Membership Dates: from: to:

The pension is: In Payment Deferred Benefit Deferred Refund

Would you like to consider a transfer to Notts Pension Fund? Yes → Complete the LGPEN 102 and forward directly to your previous Pension Fund
 No → No further action necessary

Section C: Previous Pension Scheme Membership

Previous pension provider name:

Policy number:

Previous pension provider address:

Postcode:

Membership Dates:

from:

to:

I authorise you to release to Notts LG Pensions Office any information they may require.

Signature:

Date:

Section D: Employer Certification

This section to be completed by the Scheme Employer and sent to Notts LG Pensions Office with a photocopy of the birth certificate or relevant section of passport.

Member's Full Name:

Member's NI Number:

Scheme Employer:

Type and place of employment:

Date commenced employment:

Date joined the pension scheme:

Actual pensionable pay at date pension contributions commenced:

Whole time equivalent pensionable pay:

Contribution rate:

Contractual hours (per week):

Whole time equivalent hours:

If a term-time employee, please state the number of contractual weeks:

Comments / additional information:

I confirm this employee is eligible to be a member of the Local Government Pension Scheme.

Certified correct:

Date:

Print name:

Tel no:

Detach the LGPEN 102 and forward to your previous pension provider, if applicable.

Send the remainder of this form to your employer.

Checklist

1. In all cases, have you:
 - completed Section A of the LGPEN 1
2. If you have membership with any other Local Government Pension Fund, have you:
 - completed Section B of the LGPEN 1
3. If you are requesting a possible transfer of pension rights into the Notts Pension Fund and **it has been less than 12 months** since you joined Notts Pension Fund in respect of your current employment, have you:
 - completed Part 1 of the LGPEN 102
 - posted the LGPEN 102 to your previous pension provider
4. If you are requesting a possible transfer of pension rights into the Notts Pension Fund and **it has been more than 12 months** since you joined Notts Pension Fund in respect of your current employment, have you:
 - completed Section C of the LGPEN 1
5. In all cases, now send the LGPEN 1 to your employer.

Transfer Quotation Request Form

LGPEN 102

Dear Pension Scheme Administrator,

I am thinking about transferring my pension with you to the Local Government Pension Scheme (LGPS), administered by Nottinghamshire County Council.

Please:

- provide a Cash Equivalent Transfer Value of my pension fund to **Notts LG Pensions Office, Business Support Centre, Nottinghamshire County Council, c/o County Hall, West Bridgford, Nottingham, NG2 7QP;**
- do this as quickly as possible because I could be credited with less additional pension if action is not taken within the LGPS's time limits; and
- inform myself or Notts LG Pensions Office if you require any additional documents or forms completing. Notts LG Pensions Office will tell you how to pay the transfer value if I decide to go ahead with the transfer.

Please note that the LGPS cannot accept a transfer of a pension credit that resulted from a Pension Sharing Order issued following divorce.

Part 1: Member details

Surname:	Title: Mr/Mrs/Miss/Ms/Other (please specify)	
Forename(s):		
Previous Surname (if applicable):		
Your home address:		
Date of birth:	Your National Insurance number:	
Marital / partnership status:		
Home address including post code:		
I was a member of your scheme	from:	to:
Pension plan / policy number:		
The date I joined Nottinghamshire's LGPS:		

I authorise you to release to Notts LG Pensions Office any information they may require.

Signature:	Date:
------------	-------

Notes

- The LGPS is a statutory scheme that was set up under a Public General Act.
- The LGPS is a contracted-out salary-related scheme approved under chapter 1 part XIV of the Income and Corporate Taxes Act 1988.
- The LGPS is a member of the Public Sector Transfer Club.
- Any Guaranteed Minimum Pension (GMP) liability included in the transfer will be revalued under Section 148 orders.
- The Employer Contracted-Out Number (ECON) is E3900002R. The Scheme Contracted-Out Number (SCON) is S2700164Q.
- The Scheme reference number is SF49/1897, PSTR 00329946RE.
- Please don't send payment at this stage. When Notts LG Pensions Office receives the transfer value information, they will tell the member how much additional membership the transfer would buy. If the member decides to proceed, Notts LG Pensions Office will ask for payment.
- If you send payment before Notts LG Pensions Office asks you to, they will return the payment.

Transfer Quotation Request Form cont.

Part 2: Pension scheme details

Dear Pension Scheme Administrator,

Please complete the information below. Alternatively, you may provide this information in your own format.

Full title and address of pension scheme:

Type of scheme: Club Other occupational (Non-club) Personal pension

Is your scheme contracted out? Yes No

Basis of Her Majesty's Revenue & Customs Approval:

ECON (employer contract-out number):

ECON (employer contract-out number):

ASCON (appropriate scheme contracted-out number):

Total transfer value payable (TV):

Post '97 transfer value:

Limited Revaluation Premium in addition to TV:

AVC fund in addition to the TV:

The date to which TV is guaranteed:

Dates of scheme membership from: to:

Dates of contracted-out membership from: to:

Weekly guaranteed minimum pension at the date of leaving* pre 06/04/1988:
post 05/04/1988:

Signature:

Date:

Print name:

Job title:

* If the dates of contracted out membership are between 6 April 1978 and 5 April 1997, you **MUST** provide the weekly Guaranteed Minimum Pension (GMP) as at the date of leaving. Notts LG Pensions Office can not administer a transfer without confirmation of this information. Failure to provide the information will result in delays and could mean a reduction in the transfer or that the deadline for transfer is missed.