

Pensions Shared Service

Transfer of Pension Rights from Other Schemes.

Notifying the Pensions Service of Other Pension Entitlements

As a new employee who has joined or is eligible to join the Local Government Pension scheme (LGPS) with either Camden, Merton, Richmond, Waltham Forest or Wandsworth Council, it is your responsibility to ensure that the Pensions Shared Service is informed of all pension benefits you have accrued (other than your State Pension). This information is essential to ensure that your pension entitlements are determined correctly.

It is important that full and accurate information is supplied, regardless of whether you intend to transfer these benefits to your current entitlement. Any inaccuracy or omission may prejudice your rights under the above regulations.

Complete Form A in all circumstances and then also Form B if you have pension rights outside the LGPS

<p>Everyone should complete and return Form A to the Pensions Shared Service without delay</p>	<p>Complete Form B if you have pension rights outside the LGPS and then send to your previous pension administrator</p>
<p>FORM A - Amalgamating previous LGPS membership with your current entitlement</p> <p>If you have any previous membership of the LGPS, including any previous membership you have built up with your current LGPS pension fund, you have the right to keep any of the earlier periods separate or to amalgamate the membership. Such elections must be made within 12 months of re-joining the LGPS.</p> <p>Please also list any pension arrangements outside the LGPS on FORM A. If you wish to transfer these also complete FORM B and send to your previous pension administrator</p>	<p>FORM B - Transferring non-LGPS pension benefits to your current entitlement</p> <p>Please note that a transfer of pension rights will not be accepted where the election to transfer is made more than twelve months after joining the LGPS.</p> <p>If you are within 12 months of joining, a Transfer Request Form (FORM B) should be completed and sent directly to any pension schemes from which you would like to consider a transfer of pension rights.</p> <p>It is your responsibility to ensure they respond to your request and provide you with the information required for the Pensions Shared Service to provide you with a quotation.</p> <p>When you receive this quotation, please forward it to the Pensions Shared Service in a timely manner.</p> <p>If you would like to consider multiple transfers, please photocopy the number of FORM B required or download the form from our website: https://pensionssharedservice.org.uk</p>

Your completed and signed form should be returned via post or a scanned copy can be sent via email to:

Address: Pensions Shared Service
PO Box 72351
London
SW18 9LQ

email:pensions@richmondandwandsworth.gov.uk

FORM A PREVIOUS LGPS RIGHTS - SEND COMPLETED FORM A TO PENSIONS

Full Name: _____ Address: _____

 Date of Birth: _____

 NI Number: _____

You are currently contributing or will shortly start contributing to the Local Government Pension Scheme (LGPS) in respect of your employment with _____. Please list below **all** other **LGPS** pension benefits that you have and indicate whether you are interested in investigating a transfer. If you have no other pension rights, please write 'NONE'.

Name and Address of your previous LGPS Administrator? Please refer to their correspondence for their name & address	Dates of Membership and job title?	Local Authority Employer	What is the current status of this pension? eg: pension preserved, concurrently contributing, pension in payment or contributions refunded,	Do you wish to investigate a transfer of these pension rights?
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No
				<input type="checkbox"/> Yes <input type="checkbox"/> No

Signed: _____ Date: _____
 *electronic signatures are **not** acceptable

NON-LGPS PENSION RIGHTS (detailed below - use additional sheets if necessary)

I have/do not have (delete as appropriate) pension rights outside of the LGPS and I confirm that I have issued Form B to my previous scheme administrators to request a Cash Equivalent Transfer Value (CETV) of my previous benefits and I understand that, once received, I must forward this to the Pensions Shared Service without delay and they will provide me with a CETV. Here are the details of the provider I sent FORM B to:

Name of previous pension scheme:

Name of scheme administrators:

Address:.....

.....Post Code:.....

Membership / Policy number:..... Period of membership: ./ ./ . to ././ ./...

FORM B - SEND FORM B TO NON-LGPS PENSION PROVIDER

Transfer Quotation Request Form (for active members of the Local Government Pension Scheme (LGPS) wishing to investigate transferring non-LGPS pension rights into the LGPS)

This form should be sent to your previous non-LGPS pension provider(s) to request the transfer value (a Cash Equivalent Transfer Value (CETV)) of your non-LGPS pension rights. **You should complete this page and pass whole FORM B to your previous provider to complete and return to you. Please note that a 12-month time limit applies to transfers.**

Dear Pension Scheme Administrator,

I am thinking about transferring my pension with you to the Local Government Pension Scheme (LGPS), administered by the Pensions Shared Service (their website: <https://pensionssharedservice.org.uk/>)

Please:

- provide a Cash Equivalent Transfer Value of my pension fund to my home address below and I will forward to the **Pensions Shared Service**;
- do this as quickly as possible because I could be credited with less additional membership if action is not taken within the LGPS's time limits; and
- inform me if you require any additional documents or forms completing.

The Pensions Shared Service 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.

Member Details

Title & Full Name: _____

National Insurance Number: _____

Date of Birth: ____/____/____

Address: _____

Email: _____ Tel No. _____

Current department/school/section name: _____

Pension Fund: Camden Merton Waltham Forest Wandsworth
(see overleaf for Fund specific details)

I was a member of your scheme from: ____/____/____ to ____/____/____

Pension plan / policy number: _____

The date I joined the LGPS: ____/____/____

I authorise you to give the Pensions Shared Service any further information they may need.

Signed: _____ Dated: ____/____/____

FORM B – CONTINUED

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 Non-club Personal pension

Is your scheme contracted out? Yes No

Basis of Her Majesty's Revenue & Customs Approval: _____

ECON (employer contract-out number): _____

SCON (scheme contracted-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 contracted-out from: ____/____/____ to: ____/____/____

Weekly guaranteed minimum pension at the date of leaving

pre 06/04/1988 _____ post 05/04/1988: _____

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.

If you have paid a refund – details of any break in membership: from:

____/____/____ to: ____/____/____