

Local Government Pension Scheme (LGPS) LG7 Declaration of LGPS Membership Form Guidance Notes for Members

2018 v1

The benefits payable to you or your dependants will be affected by any previous or continuing membership of the LGPS in England or Wales. **You must complete this form if you:**

- ✓ were previously a member of the LGPS in England or Wales, and/or
- ✓ you are still a member of the LGPS in an ongoing employment in England or Wales

This is NOT the form to complete if you want to investigate a transfer of pension rights other than LGPS rights built up in England or Wales. Please complete form LG8 if you wish to investigate a pension transfer from a different pension scheme or arrangement.

How we will use the information provided in this form

A copy of this form will be sent to the pension fund(s) named by you in **Part C**. We will also tell the administrators of that fund the date that you joined your current pension fund. In addition, in certain circumstances we may need information about your membership of another public sector pension scheme in order to provide you with an accurate pension transfer quotation (See **Membership of other public sector pension schemes** on the next page). If this applies to you then a copy of this form will be supplied to the administrators of the scheme(s) named by you in **Part D**.

PART A – Your personal details

Please complete this section fully.

Your date of birth will determine the date your LGPS benefits are payable, and the amount of any transfer payment payable by your former scheme and must be verified before any pension transfer can be completed. Please arrange for a representative of your employer to certify a photocopy of your birth certificate or passport and attach it to this form. The copy should:

- ✓ Be stamped with an official stamp of your employer
- ✓ Include the words 'Certified a true copy of the original'
- ✓ Be signed and dated by a representative of your employer

PART B – Declaration of LGPS Membership

To make sure that your LGPS benefits, and any LGPS benefits payable to your dependants, are worked out correctly, it is very important that you declare **all LGPS membership in England and Wales**, even if those benefits are not available to transfer.

You do not need to declare in this part:

- × A LGPS dependant's pension that you are receiving
- × Any LGPS benefits awarded to you as part of a pension sharing order following a divorce or dissolution of a civil partnership
- × LGPS membership in Scotland or Northern Ireland

Please complete **Parts B & C** for your most recent period of LGPS membership (and any other membership in that same fund) and a copy of **Parts B & C** for any earlier periods of LGPS membership.

If you want more information about combining your deferred benefits with your active pension account you must answer YES to Q1.

Transferring previous LGPS membership

You have the right to compete a pension transfer **within your first year of LGPS membership**. Please complete and return this form as soon as possible after you re-join the LGPS.

It may be possible to investigate a pension transfer more than a year after re-joining the LGPS, but only if your employer and the administering authority give their consent.

Only certain types of membership can be combined with your active membership, and the rules governing pension transfers depend on what 'type' of LGPS membership you have:

Active membership / Pension in payment – It is not possible to combine two periods of active membership or to combine a pension in payment with your active membership.

Deferred refund – If your previous period of membership was not long enough to qualify for benefits in the LGPS, but you did not receive a refund of contributions, then you currently hold a deferred refund. This membership will be automatically combined with your active pension account.

Deferred benefits – if your previous period of scheme membership was long enough to qualify for LGPS benefits then you currently hold deferred benefits. We will provide you with details of your options once we have received more information about your deferred benefits from your previous LGPS pension fund.

Please be aware that:

- By completing this form you have not made a firm commitment to combine your deferred LGPS benefits with your active pension account
- We will provide you with more information about your options before asking for your final decision (must normally be made within 12 months of re-joining)
- Depending on your dates of LGPS membership, a transfer may be automatic unless you elect to keep separate benefits
- If you became entitled to deferred benefits as a result of electing to opt out of the LGPS after 10 April 2015 then it **will not** be possible to combine these deferred benefits with your active membership

Please read any documentation about a pension transfer carefully to make sure that you understand your options and any deadlines that apply.

Membership of other public sector pension schemes

If you have indicated that you wish to investigate combining deferred LGPS benefits with your active membership (by answering **YES** to **Q1**) then the options open to you may be affected if you have membership of another public sector pension scheme. The information you provide in **Part D** will be used to ensure that your entitlements are correctly calculated.

Please be aware that by completing this section **you are not making a request to transfer these non-LGPS pension benefits to your active pension account**. Please complete form LG8 if you want more information about transferring non-LGPS (England and Wales) benefits to your active pension account.

Contact Information	
Please return the completed form with a certified copy of your birth certificate / passport to: Pension Services, Room 218 County Hall, Penrhyn Road, Kingston upon Thames KT1 2DN	
If you have any questions you can contact the Pensions Helpdesk:	
By email	myhelpdeskpensions@surreycc.gov.uk
By phone (9am to 4pm)	0300 200 1031

Local Government Pension Scheme (LGPS) LG7 Declaration of LGPS Membership Form

IMPORTANT - Please read the Guidance Notes carefully before completing this form

PART A – Your personal details

Title:	Full name:
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NI Number:	Date of birth:
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Your home address:	Postcode:
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Email address:

Telephone:	Payroll number:
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Employer:

What is your current partnership / marital status? *Please tick one box*

<input type="checkbox"/> Married	<input type="checkbox"/> Divorced
<input type="checkbox"/> Civil partnership	<input type="checkbox"/> Widow / widower
<input type="checkbox"/> Civil partnership dissolved	<input type="checkbox"/> Never married or formed a civil partnership
<input type="checkbox"/> Cohabiting partner	

Certified copy of birth certificate / passport attached	<input type="checkbox"/>
<i>Please see Guidance notes for further information</i>	

PART B – Declaration of LGPS membership

IMPORTANT - Please read the Guidance Notes carefully before completing this form

You must let us know about all your periods of LGPS membership in England and Wales. Please complete **Parts B & C** to let us know about your previous periods of LGPS membership, and any other membership in that pension fund. Please complete another copy of **Parts B & C** if you have LGPS membership held in another Fund.

You will need to include the status of the pension scheme membership:

- 1. Active member** – still employed and paying in to the pension scheme
- 2. Deferred benefits** – no longer paying in to the scheme, but pension not yet in payment
- 3. Refunded** – you have received a refund of pension contributions paid
- 4. Deferred refund** – you did not qualify for deferred benefits, but you have not received a refund of contributions
- 5. Pension in payment**
- 6. Transferred** – pension benefits transferred to another scheme or fund (please specify the company or fund that received the transfer)

PART C – Declaration by LGPS member

I authorise Orbis to obtain the information about my LGPS membership that is needed to calculate my LGPS entitlements accurately and (if I have answered **YES** to **Q1** above) to obtain the information needed to provide me with a pension transfer quotation.

I authorise the administrators of the LGPS pension fund named above to release to Orbis the information they request about my previous and/or ongoing pension scheme membership.

AND If I have indicated that I wish to investigate a possible transfer of previous LGPS benefits (by answering **YES** to **Q1**):

I authorise the LGPS pension fund named above to release to Orbis the information they request concerning a possible pension transfer.

Signed

Date

Part D - Membership of other public sector pension schemes

The calculation of your LGPS pension and the basis of a pension transfer may be affected by your previous membership of another public sector pension scheme.

Please complete this section if you are currently a member of, or were previously a member of any of the following schemes:

Civil Service Pension Scheme
 Teachers' Pension Scheme
 Firefighters' Pension Scheme
 LGPS (Scotland)

NHS Pension Scheme
 Armed Forces Pension Scheme
 Police Pension Scheme
 LGPS (Northern Ireland)

IMPORTANT – This is NOT a request to investigate a possible pension transfer from the scheme(s) you name below.

Name of Scheme	Address of Scheme Administrators	Membership dates	Status of membership (See page 1)
		From / /	
		To / /	
		From / /	
		To / /	
		From / /	
		To / /	
		From / /	
		To / /	

PART E – Declaration by LGPS member

I authorise Orbis to obtain the information about my membership of the public sector pension schemes named above that is needed to calculate my LGPS entitlements accurately.

I authorise the administrators of the pension schemes named above to release to Orbis the information they request about my previous and/or ongoing pension scheme membership.

Signed

Date