

Transfer of Pension Rights into the Local Government Pension Scheme (LGPS) - Member Guide

You should complete this form if you wish to investigate the transfer of previous pension rights to the LGPS. If you have previous pension rights in more than one scheme that you wish to investigate transferring then please complete a copy of this form for each scheme.

You should NOT use this form if you have previous membership of the LGPS in England or Wales that you are considering combining with your current membership. Please use form LG7 for this purpose.

The summary below sets out the process and timescales. You can read more detailed information in the Guidance notes on page *.

STEP 1

- First check that you are within the time limits shown in the Guidance notes
- Complete part A (and Part B if required) of this form and send it to your previous pension provider - you should keep a copy for your records
- Please **DO NOT** send us any statements or policy documents. Keep these safe as you may be required to return them to your previous pension provider

STEP 2

- Your previous pension provider supplies you with a pension transfer quotation and discharge forms which you should send on to us as soon as possible
- Using the transfer quotation we will estimate the additional benefits that you would receive from the LGPS if the transfer goes ahead
- We may need to contact HMRC for extra information that can delay your quote

STEP 3

- Decide whether or not to proceed with the transfer. You may wish to seek independent financial advice
- If you decide to proceed, complete the transfer forms and return them to the pensions team
- **IMPORTANT** some transfer payments are guaranteed for a limited period and so it is important that you take note of any deadlines we tell you about.

STEP 4

- The Pensions Team will request payment of the transfer from your previous pension provider
- Once the money is received we will write to you confirming the increase in your LGPS pension as a result of the transfer. This usually takes 6-8 weeks but can take longer.
- Your transfer is now complete

Local Government Pension Scheme (LGPS) LG8 Transfer In – Application Form

2018 v1

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

PART A – Instruction to former pension scheme

Dear Pension Provider

I am considering transferring the pension rights I hold in your scheme to the Local Government Pension Scheme (LGPS). Please read Part B overleaf and provide the transfer information requested and any discharge forms that will need to be completed if I elect to proceed with the transfer. Please send these to my home address so that I can pass them on to my current pension provider.

I authorise the scheme named below to release to Orbis any additional information they request in order to provide me with a pension transfer quotation.

I authorise Orbis to obtain from the pension scheme named below any additional information they need to provide me with a pension transfer quotation.

The LGPS cannot accept a transfer of a pension credit that was awarded as a result of a Pension Sharing Order issued following a divorce or dissolution of a civil partnership.

Title:	Full name:
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NI Number:	Date of birth:
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Home address:
Postcode:

Status: Married Single Widow/er Civil Partner Cohabiting partner Divorced

Email address:

Telephone:	Date joined LGPS:
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Name and address of previous pension scheme:
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Membership or policy number:

Period of scheme membership	From	To
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Signed:	Date
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Certified copy of birth certificate / passport attached

Please see Guidance notes for further information

PART B – Membership of other public sector pension schemes

There is a special transfer arrangement between public sector schemes and the basis of a pension transfer calculation may be affected if you have previous membership in more than one public sector pension scheme.

You only need to complete this section if:

- ✓ You have requested a transfer quotation from a scheme named below in Part C AND
- ✓ You have been a member of another public sector pension scheme named below since leaving that scheme

Civil Service Pension Scheme

NHS Pension Scheme

Teachers’ Pension Scheme

Armed Forces Pension Scheme

Firefighters’ Pension Scheme

Police Pension Scheme

LGPS (Scotland)

LGPS (Northern Ireland)

Name of Scheme	Address of Scheme Administrators	Membership dates
		From / /
		To / /
		From / /
		To / /
		From / /
		To / /
		From / /
		To / /

Part B2 – Declaration by scheme member

I authorise Orbis to obtain information about my membership of the public sector pension schemes named above that is needed to establish the basis of a transfer calculation correctly.

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

PART C – To be completed by former pension scheme

Please read the guidance notes on page * and answer the questions below or provide your own correspondence that includes the information requested.

This is a request for a transfer quotation only. Please **do not send any transfer payment**.

IMPORTANT – Return the entire completed form or transfer statement plus any discharge forms to me at my address in Part A. **Please ensure that the entire form is returned to me.**

To be completed by the previous pension provider and returned to the scheme member

I require this information because I am interested in transferring my pension rights with you to the LGPS.

Please answer all of the questions below or detail in your own documentation and return the entire form to me.

Part A – Transfer Details

Date Member Requested Transfer Value Quotation	/ /			
Name of the Scheme				
HMRC Tax Reference (PSTR No)				
Type of Policy	*Club Scheme <input type="checkbox"/> Personal Pension Scheme <input type="checkbox"/> Occupational Scheme <input type="checkbox"/> Please tick appropriate box			
*If the transfer is from a scheme that participates in the public sector transfer club and the member has built up benefits in the Career Average Revalued Earnings (CARE) scheme, we will also require:				
Current value of the CARE pension (based on deferred revaluation and indexation)				
Current value of the CARE pension if in-scheme revaluation instead of deferred revaluation and indexation has applied				
Basis of in-scheme revaluation				
Dates of Membership	From		To	
Dates of contracted out membership	From		To	
ECON Number				
SCON Number				
Weekly GMP/COD amount at 05/04/97 or date if leaving earlier	Pre April 1988		Post April 1988	
Transfer Value	£			
Pre 1997 Transfer Value				
Post 1997 Transfer Value				
Previous AVC Scheme Contributions – Transfer value				

Part B Declaration

The following must be signed by a responsible officer of the pension scheme on behalf of the Trustees or Administrators

Signature		Date	
Name		Position	
Telephone Number		Email address	

Please do not send payment at this stage.

Local Government Pension Scheme (LGPS)

LG8 Transfer In – Guide for members

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An application to transfer pension benefits into the Scheme must be made before your Normal Pension Age and within 12 months of joining the scheme (or later if agreed by the Administering Authority or Employing Authority due to exceptional circumstances).

You should complete this form if you wish to investigate the transfer of previous pension rights to the LGPS. If you have previous pension rights in more than one scheme that you wish to investigate transferring then you should complete a copy of this form for each scheme.

You will need to obtain a pension transfer quotation from your previous pension provider in order to start the transfer process. You can request a quotation by completing **Part A** of this form and sending the form to your previous pension provider.

What if I have previous LGPS membership?

You should NOT use this form if you wish to look into combining previous membership of the LGPS (in England or Wales) with your current membership. You should complete form LG7 for this purpose.

Are there any time limits?

A transfer request must normally be made within 12 months of joining the LGPS.

What if I have been a member of another public sector pension scheme?

The LGPS is a member of the Public Sector Transfer Club. The 'Club' is a network of public sector schemes that have agreed to pay and receive transfers on the same basis if certain conditions are met. A transfer can only proceed on 'Club' terms if the transfer is **completed** within your first year of LGPS membership.

Please be aware of these time limits and respond quickly to any correspondence you receive concerning a pension transfer.

What happens next?

Once you receive a pension transfer quotation from your previous pension scheme, you should contact the pensions team as soon as possible and send us:

- ✓ The pension transfer quotation and any discharge forms supplied by your previous pension provider
- ✓ a copy of this form
- ✓ a certified copy of your birth certificate (see below).

Transfer quotations are often guaranteed for a limited period and so it is important that you forward the correspondence to us as soon as possible.

Once we have received the pension transfer quotation, we will give you an estimate of the additional LGPS benefits that would be awarded in the LGPS if the transfer were to proceed. At that point we would ask for your final decision.

Your date of birth will determine the date your LGPS benefits are payable, and the transfer calculation and must be verified before any pension transfer can be completed. Before you return this form to the pensions team, 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

IMPORTANT – by completing this form you are not making a commitment to proceed with the pension transfer. You will only be asked for your final decision after we have let you know what additional benefits the transfer payment would ‘buy’ in the LGPS.

Local Government Pension Scheme (LGPS) LG8 Transfer In – Guide for Previous Pension Provider

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Notes for the previous pension provider

The Local Government Pension Scheme is a statutory contracted out salary related scheme approved under Chapter 2 of Part 4 of the Finance Act 2004 (PSTR No: 00329946RE). Revaluation of the Guaranteed Minimum Pension is in accordance with section 148 of the Social Security Administration Act 1992. It is contracted out of the State Second Pension Scheme (S2P).

We are unable to accept transfer payments from Pension Credit benefits which have been obtained as a result of pension sharing proceedings.

The LGPS is a member of the Inner Club and can only accept a transfer of CARE benefits on Club terms if the sending scheme is also in the Inner Club. Final salary benefits can be accepted on Outer Club terms if the relevant time limits are met.

For a transfer from an Inner Club scheme, the sending scheme will need to provide details of any elements of the Club transfer for which the member has paid for an earlier pension age. The CARE pension should be provided and separate transfer values for the final salary element and the CARE element of the transfer should be detailed in your calculation. **Please send a copy of your calculation.**

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