

**Local Government Pension Scheme**  
**Request for a cash equivalent transfer value (CETV)**  
**Deferred Members only**



Please complete the following sections and sign the declaration overleaf.

1. Personal details											
Name .....	Title .....										
Address .....											
Postcode .....											
National Insurance number	<table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Date of birth	<table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>										
Email address .....	Payroll number .....										
Daytime telephone .....	Daytime telephone .....										

2. Partnership status	
a)	<input type="checkbox"/> Married <input type="checkbox"/> Civil partner <input type="checkbox"/> Cohabiting partner <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Civil partnership dissolved
b)	Date effective from: .....

3. Please select one of the following:	
<b>CETV for use in divorce proceedings</b>	<input type="checkbox"/>
We will provide information in our standard format, together with a schedule of charges that apply for work carried out in relation to divorce and pension sharing.	
<b>CETV for transfer to Defined Contribution schemes offering flexible benefits</b>	<input type="checkbox"/>
We will provide you with a Cash Equivalent Transfer Value to forward to the DC scheme.	
<b>Name of new scheme:</b> .....	
<b>CETV for transfer to:</b> <b>Occupational scheme</b> <input type="checkbox"/> or <b>Overseas scheme</b> <input type="checkbox"/>	
We will provide you with a cash equivalent transfer value plus relevant discharge forms, depending on your above choice, to forward to your new pension scheme.	
<b>Name of new scheme:</b> .....	


4. Notes
<p>The scheme regulations and the Pensions Schemes Act 1993 state that a member is entitled to a cash equivalent transfer value for the purposes of transferring benefits provided that the member elects to transfer at least one year before their NPA. If you are unsure of your NPA please contact us before completing this form.</p> <p>Transfer value information will be provided (where applicable) within 15 working days of receiving this form.</p>

**If you are requesting a CETV for a possible transfer to a Defined Contribution scheme please see all sections on this page, if not go straight to section 9**

<b>6. Other LGPS membership:</b>			
Please confirm any other entitlements under the LGPS:			
Administering Authority	Dates of Membership		CETV Value:
	From	To	
			£
			£

<b>7. Transfer to Defined Contribution scheme:</b>
From 6 April 2015 the Pensions Schemes Act requires the LGPS Pension Fund Authority to ensure a member has taken ‘appropriate independent financial advice’ prior to transferring from the scheme. This advice is necessary where a member’s total benefits in the LGPS have a CETV of above £30,000. Please read the following statements:
I understand I must take independent advice before requesting payment of the transfer value
I understand the cost of such advice is NOT met by the pension fund
At the point of transfer my adviser will complete an advice confirmation form issued by the LGPS proving such advice has been given
I understand any other LGPS deferred benefits with separate funds must be taken into account in determining the £30,000 limit, and I have provided details of other benefits above
I understand I cannot request a CETV if I have active on-going membership of the LGPS in England and Wales
I understand if my total LGPS funds have a value of £30,000 or under I do not need to prove such advice has been provided

<b>8. Authorised independent advisor</b>
<p><i>Under the Pension Schemes Act 2015, “authorised independent adviser” means a person who:</i></p> <ul style="list-style-type: none"> <li><i>has permission under Part 4A of the Financial Services and Markets Act 2000, or resulting from any other provision of that Act, to carry on a regulated activity specified in regulations* made by the Secretary of State (i.e. authorised by the FCA), and</i></li> <li><i>meets such other requirements as may be specified in regulations made by the Secretary of State for the purpose of ensuring that the person is independent.</i></li> </ul>

<b>9. Declaration</b>
<p>I confirm that I have read this form and completed it correctly to the best of my knowledge. I understand that a CETV will be provided in accordance with the request I have made. I understand that if there is a delay in providing the information Pension Services will notify me accordingly. I understand I am entitled to one cash equivalent transfer value in any 12 month period.</p> <p>Signed: ..... Date: .....</p>
 <p>For information on how we hold and use your data, please visit <a href="https://www.hants.gov.uk/hampshire-services/pensions/local-government/contact-and-resources/privacy-notice">https://www.hants.gov.uk/hampshire-services/pensions/local-government/contact-and-resources/privacy-notice</a></p>