

Request for Transfer Details

Please complete Section 1 of this form if you wish to request transfer information from your former scheme. Do not complete Section 2 (overleaf). This is for completion only by the trustees/Manager of your former scheme.

SECTION 1 – TO BE COMPLETED BY THE MEMBER AND THEN *SEND TO THE PREVIOUS PENSION PROVIDER*

PART A – PERSONAL DETAILS

Full Name (BLOCK CAPITALS)

Previous Surname (if any)

National Ins No.

Home Address

Postcode:

Date of Birth

Marital status

E-mail address

Tel No.

PART B – PREVIOUS PENSION SCHEME DETAILS

Previous Pension Scheme

Administrator (if different)

Policy/Membership Number

Dates of previous scheme membership

From:

To:

Address of Administrator

Postcode:

PART C - DECLARATION

I authorise the above named Pension Scheme (shown in Part B) to provide the information with regard to the possible transfer of my pension benefits to Fife Pension Fund.

Signature

Date

Full Name (BLOCK CAPITALS)

Information about the Local Government Pension Scheme

Full name of receiving scheme: Local Government Pension Scheme (Scotland) (LGPS)

Scheme details: The LGPS is a statutory scheme established under a public general act.

Any GMP liability included in a transfer will be subject to full revaluation under section 148 orders:

PSTR Reference: 00822206RP

ECON: E3900002R

SCON: S2700207F

Further information on the LGPS can be found at www.fifepensionfund.org

SECTION 2 – TO BE COMPLETED BY THE PREVIOUS PENSION PROVIDER & RETURNED TO THE SCHEME MEMBER

We require this information because the member named in Section 1 is interested in transferring their pension rights with you to the LGPS. The LGPS is not able to accept a transfer of benefits which is derived from a Pension credit (A pension credit refers to benefits granted to a spouse by a court under a pension sharing order or by a qualifying agreement in Scotland following a divorce or annulment of marriage)
 Please answer all questions below or tell us on your own documentation (ensuring all questions are covered) and return the form to: **THE SCHEME MEMBER NAMED IN SECTION 1**

PART A – TRANSFER DETAIL

Name of the transferring Scheme				
HMRC tax reference (PSTR) no.				
Type of policy (Please tick appropriate box)	<input type="checkbox"/> Club Scheme* <input type="checkbox"/> Non Club Scheme <input type="checkbox"/> Other (Please specify): _____			
Dates of membership	From:		To:	
Dates of contracted-out membership	From:		To:	
ECON number				
SCON number				
ASCON number				
Weekly GMP amount at date of leaving	Pre April 1988		Post April 1988	
Rate of GMP revaluation				
Transfer Value		Guarantee date:		
Pre 1997 Transfer Value				
Post 1997 Transfer Value				
Value of accumulated AVC fund		Date scheme AVC commenced		

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	
Tel No		E-mail address	

Please do not send payment at this stage

***Notes for Club Schemes:** If the member has had a break of more than five years in active membership of a public service scheme between the date they left your scheme and the date they join the LGPS, please provide a non club TV. If there isn't such a break provide a split of the club TV based on membership and the TV based on CARE benefits.

**How to transfer your previous pension rights into the
Local Government Pension Scheme**

Which of my previous pensions can I transfer?

The Fife Pension Fund is only permitted to accept transfer requests within 12 months of becoming a scheme member from:

- Any personal pension scheme
- Any occupational pension scheme
- An associated AVC arrangement with one of the above

We cannot accept a transfer derived from a pension credit. A pension credit refers to benefits granted to a spouse by a court under a pension sharing order or by a qualifying agreement in Scotland following a divorce or annulment of marriage.

STEP 1

Check you are within the time limits shown below:

- You must apply within 12 months of joining the LGPS
- You may not be able transfer any previous pension benefits after the age of 65 – please refer to your previous providers regulations
- You should check with your previous pension provider if they have set a time limit for transferring before proceeding

STEP 2

Complete Section 1 of the Request for Transfer Details form then forward both pages of the form to your previous pension provider (complete one form for each transfer request):

- This form requests the exact information we need, it is not a commitment to transfer but simply an enquiry
- **Please do not send us any statements or policy documents at this stage**

STEP 3

Your previous pension provider should respond directly to you, simply forward **everything** to us as quickly as possible including any forms (You should not complete **anything** at this stage).

If you have not received the information within 6 weeks, you should contact your previous provider.

Using the transfer details we will send you a quote of the value of benefits that could be purchased by the transfer value along with any forms you need to sign.

STEP 4

Once you have received the quote, you can decide whether or not you wish to transfer. You may wish to seek independent financial advice.

You should complete the forms we have sent you and return them without delay to:

Pensions Section, Shared Service Centre, Finance & Corporate Services, Rothesay House, Rothesay Place, Glenrothes, KY7 5PQ

STEP 5

We will request the transfer payment from your previous pension provider. On receipt of the payment we will write to you confirming the final amount of pension benefits purchased.