

Local Government Pension Scheme
Confirmation of Request for a Cash Transfer Sum

TVOUT01A

When you have completed and signed the form, please return either by:

- Scanning and emailing it to pensions@northamptonshire.gov.uk if possible; or
- Sending it to LGSS Pensions Service, One Angel Square, 4 Angel Street, Northampton, NN1 1ED

Section 1 Your Personal Details (Please use BLOCK CAPITALS)

Surname: _____ Title: _____

Forenames: _____ Previous Surname(s): _____

Address: _____

Post Code: _____ Date of Birth: _____

Home Email Address: _____ National Insurance No: _____

Home Phone No: _____ Work Phone No: _____

Employer: _____ Payroll No (if known): _____

Assumed Date of Leaving LGPS: _____

Section 2 Partnership Status

Single Married Registered Civil Partnership Cohabiting Partner* Divorced Surviving Spouse

* Only applicable if you were a contributing member of the Local Government Pension Scheme on or after 1 April 2008. To declare a qualifying cohabiting partner, you must complete a Cohabiting Partner Declaration form which can be obtained directly from LGSS Pensions Service or downloaded from:

<https://lgssmember.pensiondetails.co.uk/home/members/lgps/active-members/forms-and-resources/index.html>

Section 3 Transfer Confirmation (Please Complete Option A or B Below by Completing the Relevant Box)

Option A – I confirm that I do wish to receive a transfer quotation and:

I have other pension rights which are either deferred or in payment in a Pension Fund administered by LGSS Pensions Service or another LGPS Pension Fund in England or Wales and I am aware that will need to obtain a cash transfer sum quote, in respect of those other rights in order to determine whether the total value is more than £30,000.00.

I have no other pension rights in a Pension Fund administered by LGSS Pensions Service or another LGPS Pension Fund in England or Wales.

Option B – I confirm that I do not wish to receive a transfer quotation.

Section 4 Declaration

I understand that:

- If the cash transfer sum of my total LGPS rights in England and Wales is more than £30,000.00 (excluding AVCs), I will have to take appropriate independent advice from a FCA authorised independent adviser, before LGSS Pensions Service can pay the CETV.
- I am expected to meet the cost of any advice provided.
- If I request a cash transfer sum of my deferred benefit from another LGPS Fund in England or Wales and I currently also an active member in another LGPS Fund in England or Wales, then I will not be entitled to a cash transfer sum from the LGPS in respect of that deferred benefit (or the period of active membership), unless I cease to be an active member of the scheme.
- I am only entitled under the regulations to one transfer quotation quote request per year.

Signed: _____ Date: _____

The Cambridgeshire Pension Fund and Northamptonshire Pension Fund are a Data Controller under the General Data Protection Regulations. This means we store, hold and manage your personal data in line with statutory requirements to enable us to provide you with pension administration services. To enable us to carry out our statutory duty, we are required to share your information with certain bodies, but will only do so in limited circumstances. For more information about how we hold your data, who we share it with and what rights you have to request information from the Fund, please visit:

Cambridgeshire Pension Fund - <http://pensions.cambridgeshire.gov.uk>
Northamptonshire Pension Fund - <http://pensions.northamptonshire.gov.uk>

This information can be made available in other languages and formats upon request such as Braille, large print and audio cassette. Please phone (01604) 366537 for further information.