

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 8.

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.

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 2022 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 Surrey Pension Services any additional information they request in order to provide me with a pension transfer quotation.

I authorise Surrey Pension Services 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.

Required information	Answer
Title:	
Full Name:	
Date of birth (dd/mm/yyyy):	
National Insurance number:	
Daytime phone number:	
Email address:	
Your home address:	
Postcode:	

Required information	Answer
Marital status (please fill in one of the following): <ul style="list-style-type: none"> • Single • Married • Widow / widower • Civil partner • Cohabiting partner • Divorced 	
Date joined LGPS (dd/mm/yyyy):	
Name and address of previous pension scheme:	
Membership or policy number:	
Start date of previous scheme membership (dd/mm/yyyy):	
End date of previous scheme membership (dd/mm/yyyy):	
Signed:	
Date (dd/mm/yyyy):	
Copy of birth certificate / photo driving licence / passport attached (please answer yes or no): See Guidance notes for further information	

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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 B and
- You have been a member of another public sector pension scheme named below since leaving that scheme

Some of these schemes include:

- 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)

Name of Scheme	Address of Scheme Administrators	Membership start date (dd/mm/yyyy)	Membership end date (dd/mm/yyyy)

Declaration by scheme member to be filled in can be found on the next page.

Part B continued – Declaration by scheme member

I authorise Surrey Pension Services 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 Surrey Pension Services the information they request about my previous / ongoing pension scheme membership.

Required information	Answer
Signed:	
Date (dd/mm/yyyy):	

LG8 Transfer in – Application Form

Part C – To be completed by former pension scheme

Please read the guidance notes on page 9 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 C – Transfer details

Required information	Answer
Date member requested transfer value quotation (dd/mm/yyyy):	
Name of the Scheme:	
HMRC tax reference (PSTR Number):	
Type of policy Please select one of the below: <ul style="list-style-type: none">• Club Scheme• Personal Pension Scheme• Occupational Scheme	

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:

Required information	Answer
Current value of the CARE pension (based on deferred revaluation and indexation) (£):	

Required information	Answer
Current value of the CARE pension if in-scheme revaluation instead of deferred revaluation and indexation has applied (£):	
Basis of in-scheme revaluation:	
Start date of membership (dd/mm/yyyy):	
End date of membership (dd/mm/yyyy):	
Start date of contracted out membership (dd/mm/yyyy):	
End date of contracted out membership (dd/mm/yyyy):	
ECON Number:	
SCON Number:	
Weekly GMP/COD amount at 05/04/97 or date if leaving earlier (pre-April 1988):	
Weekly GMP/COD amount at 05/04/97 or date if leaving earlier (post-April 1988):	
Transfer value (£):	
Pre 1997 transfer value (£):	
Post 1997 transfer value (£):	
Previous AVC Scheme Contributions – Transfer value (£):	

Part C – Declaration

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

Required information	Answer
Signature:	
Date (dd/mm/yyyy):	
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

An application to transfer pension benefits into the Scheme must be made within 12 months of joining the scheme (or later if agreed by the Administering Authority and your 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 copy of your birth certificate / photo driving licence / passport (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 attach a photocopy of your birth certificate, photo driving licence or passport.

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

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 copy of your birth certificate / photo driving licence / passport to:

Surrey Pension Team, PO Box 465, REIGATE, RH2 2HA.

Or email a scanned copy to: lgps.forms@surreycc.gov.uk

If you have any questions you can contact the Customer Relationship Team:

By phone (9am to 4pm): 0300 200 1031