|  |  |
| --- | --- |
| **Local Government Pension Scheme Estimate request form (LG29) 2022.v1.1** | **Return completed form securely to:** |
| [**lgps.forms@surreycc.gov.uk**](mailto:lgps.forms@surreycc.gov.uk)  via Egress Switch |

|  |
| --- |
|  |

|  |  |
| --- | --- |
| **Pension fund** |  |
|  |  |
| **Name of employer:** |  |
|  | |
| **Section 1: Member’s details** | |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | Surname: |  | First name: |  | Title: |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | NI number: |  | Date of birth: |  | Unique pay number: | | |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Section 2: Reason for estimate request** | | |  | **Estimated last day** | | | | **/****/** | |
|  | | |  | | | |  | | |
|  |  |  | | |  |  | | |  |
| **Redundancy** (age 55 or over) |  | **Resignation**  (age 55 or over)  **Notional Transfer Out/CETV**  **Death in service**  **Ill health** – specify likely Tier either: 1 or 2 or 3  **Other** –  please specify | | |  | **Flexible retirement**: standard | | |  |
|  |  |  | | |  |
| **Business Efficiency**  (age 55 or over)  **Early payment reductions waived**  (compassionate grounds if joined pre 1 April 2014) |  | **Flexible retirement:**  reductions waived  Do you have a published discretions policy which allows partial flexible retirement?  (Y or N )  **If YES:**  All pre 2008 benefits must be taken on flexible retirement.  Amount of Post 2008 benefits taken by member if not 100%  Amount of Post 2014 benefits taken by member if not 100% | | |  |
|  |  |  |
| **Employer consent**  (employer funding early payment before 60) |  |
|  |  | | |  |  | | |  |
|  | | | | | | | | | |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Section 3: Final pay *(LGPS 2008 definition)*** | | | | |
|  | | | | |
| The final pensionable pay shown below is in respect of the period: | **From** |  | **To** |  |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **Period** | | **(A) Actual annual salary** | **(B)**  **% WTE hours** | **(C) WTE annual salary** | **(D) Fraction of months and days** | **(E) Total amount of WTE pay** | | **From** | **To** | |  |  | **£** | **%** | **£** |  | **£** | |  |  | **£** | **%** | **£** |  | **£** | |  |  |  |  | **Subtotal (A)** | | **£** |   **Final pay - Additional variable payments *(LGPS 2008 definition)***  Please show any additional variable payments made (excluding overtime and additional hours under the LGPS 2008 definition) together with the period the payments were in respect of.   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Type of additional variable payment (under LGPS 2008 regulations)** | **Period for which payment(s) earned** | | **Total payment** | **Amount of payment relevant to final pay period** | |  |  |  | **£** | **£** | |  |  |  | **£** | **£** | |  |  |  | **Subtotal (B)** | **£** |  |  |  | | --- | --- | | **Please now complete page 2.**  **Total of A and B** | **£** | | | | | |

**Estimate request form (LG29)**

|  |
| --- |
|  |

|  |
| --- |
| **Section 4: Pensionable pay for LGPS 2014 scheme** |
| Provide details of the applicable Section (Main or 50/50) to the estimated last day of membership. |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Table A** – complete in **all** cases - **Year ending 31 March 2023** | | | | | | Pensionable pay in **Main Section** | **£** |  | Pensionable pay in the **50/50 section** | **£** | |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Table B** – Complete where the estimated last day of membership is **before 1 April 2024**  **Period from 1 April 2023 to estimated leaving date** | | | | | | Pensionable pay in **Main Section** | **£** |  | Pensionable pay in the **50/50 section** | **£** | |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Table C** – Complete where the estimated last day of membership is **after 31 March 2024.**  **Annual pensionable pay to project forwards from 1 April 2023** | | | | | | Annual Pensionable pay in **Main Section** | **£** |  | Annual Pensionable pay in the **50/50 section** | **£** | |
| **Assumed Pensionable Pay**  If the estimate request is in respect of a possible **Tier 1 or Tier 2** ill health retirement, death in service or divorce CETV case, you will need to provide the Assumed Pensionable Pay (APP) figure at the last day of membership.     |  |  | | --- | --- | | **What is the APP figure?** (This should be the annual rate) | **£** | |
|  |
| **Section 5: Declaration by employer completing form** |
| I understand that the information given on this form will be used to calculate an estimate of pension benefits and any errors or omissions will result in an incorrect estimate of member’s benefits as well as any associated employer costs.  I understand that, in the event of an actual retirement, the **Final Pay** figure (LGPS 2008 definition) will need to be the highest year in the last 3 years ending on the anniversary of the date of leaving. I further certify that I am aware of the requirement to provide additional salary figures if there has been a drop in pay in the 10 years prior to the date of leaving.   |  |  |  | | --- | --- | --- | | Print name: |  | Phone number: | |  |  |  | | Email address: |  | Date: | |
| **Notes**: Please refer to the **Guidance notes for employers**when completing this form.  **Section 3 – Pensionable pay for LGPS 2014 scheme:** the pensionable pay figure should include Assumed Pensionable Pay (APP) for any periods that the member’s pay has been/will be reduced due to sickness or during a period of ordinary maternity or adoption leave, paid additional maternity or adoption leave or paid shared maternity leave.  **Assumed Pensionable Pay (APP)** – You will need to calculate the annual APP figure when you are requesting figures for a possible Tier 1 or 2 Ill health retirement, Death in service or Divorce CETVs.  Please refer to the HR and Payroll Guides produced by the Local Government Association for more information on pensionable pay and APP: [**www.lgpsregs.org/employer-resources/index.php**](http://www.lgpsregs.org/employer-resources/index.php) |