# Local Government Pension Scheme (LGPS)

# Estimate request form (LG29)

## Section 1: Employer’s Details

|  |  |
| --- | --- |
| **Employer Information** | **Answer** |
| Name of Employer: |  |

## Section 2: Member’s Details

|  |  |
| --- | --- |
| **Member Information** | **Answer** |
| Title: |  |
| Forename: |  |
| Surname: |  |
| National Insurance Number: |  |
| Date of Birth: |  |
| Unique Pay Number: |  |

## Section 3: Estimate Request Details

|  |
| --- |
| **Estimated Last Day (DD/MM/YYYY):** |
|  |

|  |  |
| --- | --- |
| **Reason for Leaving** | **Answer – Tick all relevant boxes below** |
| Resignation (Age 55 or over) |  |
| Resignation - Early payment reductions waived (compassionate grounds if joined before 1 April 2014) |  |
| Employer Consent (employer funding early payment before 55) |  |
| Redundancy (Age 55 or over) |  |
| Business Efficiency (Age 55 or over) |  |
| Notional Transfer Out/CETV |  |
| Death in service |  |
| Ill-Health (please specify likely Tier, either 1, 2 or 3) |  |
| Divorce CETV |  |
| Flexible Retirement: Standard |  |
| Flexible Retirement: Reductions Waived |  |
| Flexible Retirement: Partial(All pre 1 April 2008 benefits must be taken following partial flexible retirement. Please also input the amount of benefits being taken in the following two boxes) |  |
| If Flexible Retirement: Partial, please state the percentage amount of post 1 April 2008 benefits being taken by member (Max 100%) |  |
| If Flexible Retirement: Partial, please state the percentage amount of post 1 April 2014 benefits being taken by member (Max 100%) |  |

## Section 4: Final Pay

Please enter the final pay figures for the 365 days prior to the estimated last day in Section 3:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Period From** | **Period To** | 1. **Actual Annual Salary**
 | 1. **% of WTE hours**
 | 1. **WTE annual salary**
 | 1. **Fraction of months & days**
 | 1. **Total amount of WTE pay**
 |
|  |  | £ |  | £ |  | £ |
|  |  | £ |  | £ |  | £ |
|  |  | £ |  | £ |  | £ |

Please add up the total amount of Whole Time Equivalent (WTE) pay shown above and record as Subtotal (A) below:

|  |
| --- |
| **Subtotal (A)** |
| **£** |

### Final pay – Additional variable payments (LGPS Regulations 2008 definition)

Please show the 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** | **Period from** | **Period to** | **Total Payment** | **Amount of payment relevant to final pay period** |
|  |  |  | £ | £ |
|  |  |  | £ | £ |

Please provide the total amount of payment relevant to the final pay period shown above and record as Subtotal (B) below:

|  |
| --- |
| **Subtotal (B)** |
| **£** |

Please provide the total of Subtotal (A) and Subtotal (B) below:

|  |
| --- |
| **Final Pay (Subtotal A + B)** |
| **£** |

## Section 5: Pensionable pay for LGPS 2014 scheme

Please provide details of the pensionable pay for the applicable Section (Main or 50/50) to the estimated last day of membership.

### Table A - to be completed in all cases

Enter the pensionable pay for previous financial year ending 31 March below:

|  |  |
| --- | --- |
| **Section of LGPS** | **Amount of Pensionable pay** |
| Pensionable pay in Main Section of LGPS | £ |
| Pensionable pay in 50 / 50 Section of LGPS | £ |

### Table B – Complete where the estimated last day is in the current financial year ending 31 March

Enter the pensionable pay from 1 April of the current financial year to estimated leave date below:

|  |  |
| --- | --- |
| **Section of LGPS** | **Amount of Pensionable pay** |
| Pensionable pay in Main Section of LGPS | £ |
| Pensionable pay in 50 / 50 Section of LGPS | £ |

### Table C – Complete where the estimated last day is in a future financial year

Enter the pensionable pay to project forwards from 1 April of the current financial year to the estimated leave date

|  |  |
| --- | --- |
| **Section of LGPS** | **Amount of Pensionable pay** |
| Pensionable pay in Main Section of LGPS | £ |
| Pensionable pay in 50 / 50 Section of LGPS | £ |

### Assumed Pensionable Pay (APP)

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.

|  |  |
| --- | --- |
| **Required information** | **Answer** |
| 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)