

**Local Government Pension Scheme
Membership Questionnaire**

Form - LGPS-I

Before completing this form, please read the guidance notes on page 5. Once complete, please return the form to the [East Sussex Pensions Team](#).

What is this form for?

Use this form to tell us whether you want to transfer other pension rights into the scheme and nominate beneficiaries in the event of your death.

1. Personal details

| | |
|---------------------------|--|
| Surname | |
| Forename(s) | |
| National insurance number | |
| Home address 1 | |
| Home address 2 | |
| Home address 3 | |
| Home address 4 | |
| Post code | |
| Telephone number(s) | |
| Email address | |

Please indicate your marital/partnership status by marking one box:

| | | | |
|-----------------------------------|-----------------------------------|--|--|
| Single <input type="checkbox"/> | Married <input type="checkbox"/> | Civil partnership <input type="checkbox"/> | Civil partnership dissolved <input type="checkbox"/> |
| Widow/er <input type="checkbox"/> | Divorced <input type="checkbox"/> | Surviving civil partner <input type="checkbox"/> | Cohabiting partner <input type="checkbox"/> |

| | | | |
|-------------------------------------|--|----------------------------------|--|
| Date status changed (if applicable) | | Previous surname (if applicable) | |
|-------------------------------------|--|----------------------------------|--|

Please enclose a photocopy of your birth certificate or passport.

| | | | | |
|---------------|--|--|------------------------------|-----------------------------|
| Date of birth | | Birth certificate / passport enclosed? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
|---------------|--|--|------------------------------|-----------------------------|

2. Election to join the Local Government Pension Scheme (LGPS)

Please tick **one** of the following boxes (if appropriate to your circumstances)

| | |
|--|--|
| <p>Option 1 - I am a new employee or have a new pensionable role and I confirm my wish to join the LGPS from my date of starting. I authorise the deduction of a pension contribution from my salary at the appropriate rate.</p> | |
|--|--|

Please date and sign below if you agree with the statement.

| | | | |
|------------------|--|-------------|--|
| Date | | | |
| Signature | | | |
| Employer | | | |
| Payroll Number 1 | | Job Title 1 | |
| Payroll Number 2 | | Job Title 2 | |
| Payroll Number 3 | | Job Title 3 | |

| | |
|--|--|
| <p>Option 2 - I am an existing employee and I wish to opt-in to the LGPS from the next available payroll. I authorise the deduction of a pension contribution from my salary at the appropriate rate.</p> | |
|--|--|

Please date and sign below if you agree with the statement.

| | | | |
|------------------|--|-------------|--|
| Date | | | |
| Signature | | | |
| Employer | | | |
| Payroll Number 1 | | Job Title 1 | |
| Payroll Number 2 | | Job Title 2 | |
| Payroll Number 3 | | Job Title 3 | |

3. Previous Local Government Pension Scheme (LGPS) membership

| | | |
|---|------------------------------|-----------------------------|
| Have you previously paid into the LGPS? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| If yes, were you paying additional contributions to purchase 'added years' Pre 2014 membership only | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

| LGPS Fund (e.g., East Sussex) | Employer | Start Date | End Date | AVC's (Yes/No) |
|-------------------------------|----------|------------|----------|----------------|
| | | | | |

If you are already in receipt of a pension from the LGPS you must write to the authority that pays that pension and inform them that you are again eligible to join the LGPS. If you are receiving a pension in respect of any previous LGPS employment and you re-join an Authority that offers the LGPS (regardless of whether or not you join the scheme) your pension may be reduced or suspended.

4. Previous non-LGPS pension arrangements

You should list all previous non-LGPS pension schemes, which you are considering transferring into their LGPS scheme. We will investigate whether a transfer is possible.

Please list your previous pension schemes in date order, with the most recent at the top.

Scheme 1

| | |
|---|--|
| Name and address of scheme administrator or insurance company | |
| Type of pension scheme | |
| Scheme membership start date | |
| Scheme membership end date | |
| If a personal or stakeholder pension, please provide policy/scheme number | |

Scheme 2

| | |
|---|--|
| Name and address of scheme administrator or insurance company | |
| Type of pension scheme | |
| Scheme membership start date | |
| Scheme membership end date | |
| If a personal or stakeholder pension, please provide policy/scheme number | |

Scheme 3

| | |
|---|--|
| Name and address of scheme administrator or insurance company | |
| Type of pension scheme | |
| Scheme membership start date | |
| Scheme membership end date | |
| If a personal or stakeholder pension, please provide policy/scheme number | |

If you need to provide further scheme information, please do so on a separate sheet ensuring the details above are provided.

5. Death grant – expression of wish

I wish the Council, in the exercise of its discretion in the payment of lump-sum death benefits, to consider paying any lump-sum death benefit due under the Pension Scheme Regulations to:

| Name | Relationship | Proportion * |
|------|--------------|--------------|
| | | % |
| | | % |
| | | % |

Should you wish to nominate additional beneficiaries, please provide details on a separate sheet. * The total of the proportion of benefits must equal 100%.

6. Declaration

To the best of my knowledge and belief the details supplied on this form are accurate and complete.

| | |
|-----------|--|
| Date | |
| Signature | |

All information will be treated in strictest confidence.

Guidance notes

The East Sussex Pension Fund is part of the Local Government Pension Scheme (LGPS). It provides pension benefits for employees of various councils and public authorities across East Sussex.

The purpose of this form is for staff of employers who are participating in the East Sussex Pension Fund to let us know whether they want to:

- Join the pension scheme
- transfer other pension rights into the scheme
- nominate a beneficiary on the event of your death.

Joining the Local Government Pension Scheme (LGPS) for the first time

If you are under age 75 and have a contract of employment for a minimum of 3 months, you will become a member of the scheme automatically unless you opt not to do so. Although membership is automatic, it is important that you complete and return this form. You can also elect to join the scheme if you do not have a contract of employment for a minimum of three months.

Please note that once you have completed 2 years LGPS scheme membership you will qualify for retirement benefits and will not be permitted to claim a refund of contributions.

Opting out of the LGPS

You may opt to leave the LGPS at any time, although you are recommended to obtain advice before making such a decision. Once you have completed two years scheme membership or have transferred other benefits into the LGPS you will qualify for retirement benefits and will not be permitted to claim a refund of contributions. An opt out form can be obtained from the scheme administrators.

If you opt out, you can re-join the LGPS at any time, but you are required to complete a new LGPS-I form within three months of the date of starting.

Rejoining the LGPS

If you wish to consider combining a previous period of LGPS membership you must elect to do so within 12 months of rejoining the LGPS, or such longer period as your employer may allow. Under certain conditions, membership from a previous employment is automatically aggregated unless you elect to retain separate benefits, again within 12 months of rejoining. The pension scheme administrators will provide you with information to assist you in deciding.

Whether or not you decide to combine LGPS membership periods, your decision will be irrevocable, and you will not be able to change it later.

Transferring pension rights from non-LGPS pension schemes

The LGPS can accept a transfer of pension rights from most pension schemes, and we can investigate this option for you. You will not be committing yourself to anything at this time and full information will be provided to you throughout the transfer process.

You will have 12 months from the date of joining the LGPS, or such longer period as your employer may allow, to decide whether you wish to transfer any previous pension rights.

You should seek independent financial advice on the best course of action to take if you are currently paying into a personal or stakeholder pension arrangement.

TUPE

If you currently work for a local authority and your contract is being transferred to an employer that already offers membership in the LGPS or you have continuing membership in the LGPS via an admission agreement (Your new employer arranges this agreement with the LGPS), you will be automatically admitted to the LGPS with your new employer at the date of transfer. Your pension record will automatically be moved to the new employer within the LGPS.

You have 12 months from the date of the TUPE transfer to elect for your LGPS from your previous employment and the LGPS from your new employer to be separated, if you would like more information on the aggregation options please email pensions@eastsussex.gov.uk.

You will also have 12 months from the date of the TUPE transfer to transfer a previous pension into the scheme. Please complete the transfer section of the enclosed membership questionnaire (LGPS-1) and return to the pensions administration team if you would like to start the transfer process.

Death grant - expression of wish

The rules of the LGPS allow for the payment of lump sums on the death of a scheme member in certain circumstances. Whilst the County Council has absolute discretion as to who to pay such a lump sum to, you can let us know who you would like this paid to. The nominated beneficiary can be a relative, friend, or an organisation such as a club or charity. You can nominate more than one beneficiary. You may revise your nomination at any time by completing Expression of Wish Form.

Annual pension benefit statement

Each year we will provide you with an annual pension benefit statement, setting out a summary of the benefits you have earned in the LGPS.

Nomination of Cohabiting Partner for Survivor's Pension

The LGPS allows you to nominate a cohabiting partner. However, to be able to make a nomination, all the following conditions must have applied to both you and your nominated co-habiting partner for a continuous period of at least 2 years on the date you both sign the nomination form:

- both you and your nominated co-habiting partner are, and have been, free to marry each other or enter into a civil partnership with each other, and
- you and your nominated co-habiting partner have been living together as if you were husband and wife, or civil partners, and
- neither you or your nominated co-habiting partner have been living with someone else as if you/they were husband and wife or civil partners, and
- either your nominated co-habiting partner is financially dependent on you, or you are financially interdependent on each other.

Full details and a nomination form are available online at www.eastsussexpensionfund.org.

Pensions guidance

[MoneyHelper](http://www.moneyhelper.org.uk/en) is here to make your money and pension choices clearer. Here to cut through the complexity, explain what you need to do and how you can do it. Here to put you in control with impartial guidance that is backed by government and to recommend further, trusted support if you need it. For clear money help that is on your side and free to use call 0800 011 3797 or visit www.moneyhelper.org.uk/en.

Further information

Should you require further information about the Local Government Pension Scheme, please refer to our website - www.eastsussexpensionfund.org.

Alternatively, you may contact the pension scheme:

Write: Pensions, East F, County Hall, St Anne's Crescent, Lewes, East Sussex, BN7 1UE

Call: 0300 100 1022

Email: pensions@eastsussex.gov.uk .