

Deferred Member Estimate Request Form

Requesting a retirement estimate for a Deferred Member

About You – Your Personal Details

National insurance Number	
Title	
Full Name	
Date of Birth	
Email Address	
Telephone Number	
Address	
	Postcode

Partnership Status

Single	<input type="checkbox"/>	Married	<input type="checkbox"/>
Civil Partnership	<input type="checkbox"/>	Divorced/Dissolved Civil Partnership	<input type="checkbox"/>
Cohabiting Partner	<input type="checkbox"/>	Widowed/Surviving Civil Partner	<input type="checkbox"/>

Estimate Details

Job Title	
Date Left	

Your chosen estimate date must be no more than 2 years from the date this form is completed and you must be age 55 or over on this date.

Estimate Date

We will send your retirement estimate through My Pension Online.

Signing your Deferred Estimate Request Form

- *I request for the Greater Gwent (Torfaen) Pension Fund to provide me with a pension estimate of my deferred pension account if paid on my chosen estimate date.*

Signature _____ **Date** _____

GDPR – Privacy Notice

The Greater Gwent (Torfaen) Pension Fund is part of Torfaen Council, which is 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 www.gwentpensionfund.co.uk/media/lhhqmj2k/privacy-notice-v5-0-21062023.pdf

Please return your **Deferred Member Estimate Request Form** to:

Please scan or photograph this form and
Upload it through your My Pension Online account; or
Email it to pensions@torfaen.gov.uk; or
Post it to: Greater Gwent (Torfaen) Pension Fund, Torfaen County Borough
Council, Civic Centre, Pontypool, Torfaen, NP4 6YB

Information about your request

- You are a deferred member of the LGPS if you no longer pay contributions into your pension account with us.
 - We aim to provide you with your estimate within 21 working days of receiving your estimate request form. This may be longer during periods when the Pension Fund is experiencing high volumes of work.
 - We will send your estimate to your My Pension Online account only. It's really simple to sign up on our website www.gwentpensionfund.co.uk Click on the My Pension Online link (at the top of the screen).
1. You'll need your National Insurance Number and your Post Code.
 2. Choose a User Name and Password.
 3. Answer some security questions. When you've registered we'll post a PIN number to your home address. When you get your PIN number (in about 5 days) you can then login to see your own pension account.
- - If you do not have internet access please contact us and let us know and we will send your estimate by post to your home address.
 - You are entitled to one free estimate request within a 12-month period or two free estimates if they are for different financial years i.e., April 2022 and April 2023. If you require a further estimate within 12 months of your previous request this may incur a charge at the discretion of the Greater Gwent (Torfaen) Pension Fund.
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 - If you are an active member you should not fill in this form you should fill in an Estimate Request Form which is available on our website under the Forms and Publications section.
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 - **You should not fill in this form if:**
 - You want to take payment of your deferred pension benefits instead fill in a Deferred Pension Payment Request form.
 - If you want your previous employer to pay your deferred benefits due to ill health, you should apply to your previous employers HR department for them to make a decision about early release of your pension due to ill health.
 - If you need an estimate for more than 2 year in the future or you have not yet reached your 55th birthday we will not be able to provide an estimate of your LGPS pension. You should login to your My Pension Online account and use the online pension calculator.



Public Service Pension Scheme Membership Form

Telling us about any previous Public Service Pension Scheme Membership

Since 1st October 2023 LGPS rules changed to remove the discrimination found in the McCloud judgement. This form is to tell us about any previous Public Service Pension Scheme Membership you have built up before the 1st April 2012 and during the McCloud Remedy Period. This will allow us to decide whether you qualify for the underpin protection. You can find out more about the McCloud Remedy for LGPS members on the national member website: www.lgpsmember.org/mccloud

You should answer no to the question in section 1 of this form if:

- You have only been a member of the LGPS with this Pension Fund and no other Public Service Membership; or
- You have already transferred your previous Public Service Membership to the Greater Gwent (Torfaen) Pension Fund

You must tell us about all periods of membership before you joined the Greater Gwent (Torfaen) Pension Fund for the following Public Service Pension Schemes:

- Civil Service Pension Scheme, Judicial Pension Scheme, Local Government Pension Scheme, Teachers' Pension Scheme, NHS Pension Scheme, Firefighters' Pension Scheme, Police Pension Scheme, Armed Forces Pension Scheme

You do not need to tell us about:

- Any non-LGPS survivors pensions you are receiving; or
- Pension Credit awards as part of a divorce or dissolution of a Civil Partnership; or
- Any Public Service Pension Scheme membership after you stopped paying into the LGPS with the Greater Gwent (Torfaen) Pension Fund

About you

National insurance Number

Title

Full Name

Date of Birth

Email Address

Telephone Number

Address

Postcode

Section 1

Do you have any Public Service Pension Scheme Membership before joining the Greater Gwent (Torfaen) Pension Fund?

Yes ☐ No ☐ If no, go to section 3 to sign this form

Section 2 - Previous Public Service Pension Scheme Membership

Scheme Name	Member Number or Reference	Membership Dates		Membership Status (Active, Deferred, Refund, Pensioner)
		From	To	

Section 3 - Sign your Public Service Pension Scheme Membership Form

- I confirm that the information I have given on this form is correct.
- I consent to the Greater Gwent (Torfaen) Pension Fund contacting the pension schemes on this form to get the information they need about my previous public Service pension scheme membership.
- I understand that the Greater Gwent (Torfaen) Pension Fund will use the information to decide if the underpin protection would apply to any of my pension benefits.

Your Signature

Date

Please return your **Public Service Pension Scheme Membership Form** to:

Please scan or photograph this form and
Upload it through your My Pension Online account; or
Email it to pensions@torfaen.gov.uk; or
Post it to: Greater Gwent (Torfaen) Pension Fund, Torfaen County Borough Council, Civic Centre, Pontypool, Torfaen, NP4 6YB

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