

## Active Member Estimate Request Form

## Requesting a retirement estimate for an Active Member

## About You – Your Personal Details

National insurance Number	
Title	
First Names	
Surname	
Date of Birth	
Email Address	
Telephone Number	
Address	
	Postcode

## Partnership Status

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

## Estimate Details

**Job Title**

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

**Estimate Date**

**We will send your retirement estimate through My Pension Online.**

## Signing your Active Member Estimate Request Form

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

**Signature** \_\_\_\_\_

Date	
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## 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 <https://www.gwentpensionfund.co.uk/media/3748/privacy-notice.pdf>

Please return your **Active 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](mailto: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

- 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](http://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 2019 and April 2020. 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.
- If you are a deferred member you should not fill in this form you should fill in a Deferred Pension Payment Request Form which is available on our website under the Forms and Publications section.
- **You should not fill in this form if:**
  - Your employer has offered you voluntary or compulsory redundancy
  - Your employer is ending your employment for business efficiency reasons
  - Your employer has awarded you ill health retirement.

If any of the above apply you should contact your employer's HR department to ask them to request your retirement figures. The Pension Fund is unable to provide these figures directly to members.

- **If you are 2 or more years from reaching your 55<sup>th</sup> 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 projector.**



**The Greater Gwent  
(Torfaen) Pension Fund**

administered by Torfaen County Borough Council

**lgps** | Local Government  
Pension Scheme

## **Public Service Pension Scheme Membership Form**

### **Telling us about any previous Public Service Pension Scheme Membership**

Since 1<sup>st</sup> 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 1<sup>st</sup> April 2012 and during the McCloud Remedy Period. This will allow us to decide whether you qualify for the underpin protection.

**You must tell us about all periods of membership 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

### **About you**

<b>Title</b>	<input type="text"/>	<b>Full Name</b>	<input type="text"/>
<b>National Insurance Number</b>	<input type="text"/>		
<b>Date of Birth</b>	<input type="text"/>		

### **Do you have any Public Service Pension Scheme Membership?**

Yes ☐ No ☐ If no, complete the signing your form section only

- **Previous Public Service Pension Scheme Membership** for 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

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

## Signing your Public Service Pension Scheme Membership Form

- I confirm that the information I have given to the Greater Gwent (Torfaen) Pension Fund on this form is correct.
- 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](mailto: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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