



Transfer In Application Form

Please read these notes before completing this form

Transfer Process:

- Complete the transfer in application form and send it to your previous pension provider
- Receive the completed documents from your previous pension provider and upload them to MPO or email them to the pension fund at pensions@torfaen.gov.uk
- Wait to receive a transfer offer from the Greater Gwent (Torfaen) Pension Fund
- Accept or reject the transfer offer.
- If accepted, the Fund will request payment from the previous pension provider and will write to you confirming the details of the additional pension bought.

Members Responsibilities:

- Complete Section A of the form.
- Contact your previous pension provider for the required transfer quote and paperwork.
- Once you receive the transfer quote and paperwork send them to us as soon as possible. The value of the transfer quote may be guaranteed usually for 3 months so send everything to us as soon as possible.

Previous Pension Provider's Responsibilities:

- Complete Section B of the form or provide a transfer statement.
- If the member has more than one pension or policy held with you, please send separate details for each one.
- Send the completed Transfer In Application form and all necessary option/discharge forms for completing the transfer to the member.

Important Information

- It is your responsibility to organise the collection of all the information required.
- You must ensure that each section is fully completed by the appropriate party and only then should you submit the full set to the Greater Gwent (Torfaen) Pension Fund.
- You must send the Greater Gwent (Torfaen) Pension Fund the completed Transfer In Application form, and all documents from your previous pension provider within 12 months of joining the Local Government Pension Scheme (LGPS) in your new job and in any case as soon as they are received to ensure we receive them within any guarantee date.
- Receiving a transfer offer does not commit you to the transfer



The Greater Gwent (Torfaen) Pension Fund

administered by Torfaen County Borough Council



Local Government
Pension Scheme

Requesting a Transfer Quote and Discharge Forms from Previous Pension Provider

Dear Pension Provider,

I wish to investigate transferring my pension I have with you into the Greater Gwent (Torfaen) Pension Fund which is part of the Local Government Pension Scheme. I have completed my personal details on this form.

Please send me a transfer quote and discharge forms that you need to be completed if I decide to transfer my pension benefits into the LGPS.

Section A - About Member – Your Personal Details

National insurance Number

Full Name

Date of Birth

Telephone Number

Email Address

Address

Postcode

Date Joined LGPS

Previous Pension Scheme

Please make sure you include any reference/policy number that your previous pension provider uses to identify your pension rights or policy

Signing your Transfer In Application Form

- I confirm that I have joined the LGPS with the Greater Gwent (Torfaen) Pension Fund. I request that my previous pension provider send me a transfer quote and all discharge forms that would need to be completed should I choose to transfer my pension to the LGPS.*
- I am authorising for any further information about me or my pension to be disclosed by my previous pension provider to the Greater Gwent (Torfaen) Pension Fund during the transfer process.*
- All the information I have given on this form is correct to the best of my knowledge.*

Signature

Date

Please send this form to your previous pension provider for them to complete section B.



The Greater Gwent (Torfaen) Pension Fund

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lgps | Local Government
Pension Scheme

Section B - To be completed by previous pension provider

You should return this completed form or provide your own transfer statement that includes all the requested information directly to the member.

Do not include any payment at this stage.

Pension Provider Name

Scheme Address

Postcode

Please provide the following contact details to enable the LGPS to contact you about any queries in relation to a transfer or to request a transfer payment.

Telephone Number

Email Address

Type of Pension Scheme

Club Pension Scheme ☐ Complete Part A Only

Non-Club Occupational Pension Scheme ☐ Complete Part B Only

Personal, Section 32 Buyout, AVC or Stakeholder ☐ Complete Part C Only

LGPS Information:

- Registered pension scheme since April 6, 2006.
- Member of the Public Sector Transfer Club.
- Defined Benefit Career Average Revalued Earnings Occupational Pension Scheme.
- Does not offer flexible benefits.
- Scheme administrator – Greater Gwent (Torfaen) Pension Fund, Civic Centre, Pontypool, Torfaen, NP4 6YB 01495 766266 – pensions@torfaen.gov.uk
- Website address: www.gwentpensionfund.co.uk

Pension Scheme Registry Number 10123052

Pension Scheme Tax Reference Number PSTR00329946RE

Scheme Contracted Out Reference Number S2700182T

Employer Contracted Out Reference Number E3900002R

Guaranteed Minimum Pension Revaluation Rate Section 148 Orders – Full Rate



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Local Government
Pension Scheme

Part A – Club Scheme (Public Sector)

Please do:

- attach a copy of the transfer calculation.
- make sure your transfer statement provides separate values for final salary and CARE elements of the transfer. It should also show the Pensions Increase amount and date as well as the relevant date used for the transfer calculation.
- **provide a non-club transfer value if there has been a break of more than 5 years between the member leaving your scheme and joining the LGPS.**

Membership Dates

Date From

Date To

Contracted Out Membership Dates (if different)

Date From

Date To

Protected Pension Age – If the member has a protected pension age for any elements of the transfer value, please clearly show the details in your transfer statement or calculation.

- If you have Option/Member Discharge forms to be completed by the Greater Gwent (Torfaen) Pension Fund and the member, please include them with this form.
- Please return directly to member.



The Greater Gwent (Torfaen) Pension Fund

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Local Government
Pension Scheme

Part B –Non-Club Occupational Scheme

Is the scheme HMRC registered? (please tick)

Yes ☐ No ☐

If yes, please complete the PSTR Reference number

Pension Scheme Tax Reference Number (PSTR)

Contracted In Status

Contracted In

☐

Contracted Out

☐

Scheme Type

Money Purchase

☐

Salary Related

☐

ECON Number

SCON Number

Membership Dates

Date From

Date To

Contracted out membership dates (leave blank if not applicable)

Date From

Date To

Transfer Value Statement

Estimate Date

Total Transfer Value

Last Date Revalued

Post 5 April 1997 transfer value (protected rights)

Weekly Amount of GMP

Pre-6th April 1988

Post 6th April 1988

GMP revaluation rate

Fixed

☐

Full

☐

Limited

☐

- Please attach details of any pension sharing or earmarking orders
- If you have Option/Member Discharge forms to be completed by the Greater Gwent (Torfaen) Pension Fund and the member, please include them with this form.
- Please return directly to member.



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Local Government
Pension Scheme

Part C - Personal Pension Schemes

Is the scheme HMRC registered? (please tick)

Yes

☐

No

☐

If yes, please complete the PSTR Reference number

Pension Scheme Tax Reference Number (PSTR)

Scheme Type

Personal

☐

Stakeholder

☐

AVC

☐

Section 32 Buyout

☐

ECON Number

SCON Number

Appropriate Scheme Contracted Out Number

Policy Dates

Date From

Date To

Contracted out membership dates (leave blank if not applicable)

Date From

Date To

Transfer Value Statement

Estimate Date

Total Transfer Value

Last Date Revalued

Post 5 April 1997 transfer value (protected rights)

Weekly Amount of GMP

Pre-6th April 1988

Post 6th April 1988

GMP Revaluation Rate

Fixed

☐

Full

☐

Limited

☐

- Please attach details of any pension sharing or earmarking orders
- If you have Option/Member Discharge forms to be completed by the Greater Gwent (Torfaen) Pension Fund and the member, please include them with this form.
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