Local Government Pension Scheme (LGPS) - Notification of employer decision form

**Section 1: Employer details**

| Employers name: |  |
| --- | --- |

**Section 2: Member’s details**

| **Question** | **Answer** |
| --- | --- |
| Full name |  |
| Title |  |
| Date of birth |  |
| National insurance number |  |
| Last day of pensionable employment (if relevant) |  |
| Job title |  |
| Pay reference |  |
| Unique post reference |  |

**Section 3: Employer’s decisions**

**Flexible retirement (LGPS 2013 regulations 30(6) TP11 (2) & 30(8))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to allow flexible retirement and for all or part of the member’s pension benefits to be paid once they’ve reduced their working hours and/or grade; and to *waive any early payment reduction* that would otherwise apply to the benefits. |  |
| The employer in section 1 has agreed to allow flexible retirement and for all or part of the member’s pension benefits to be paid once they’ve reduced their working hours and/or grade. A decision has been made *not to waive any early payment reduction* that may apply to the benefits. |  |
| The employer in section 1 has agreed to allow flexible retirement and for all or part of the member’s pension benefits to be paid once they’ve reduced their working hours and/or grade. |  |

And to waive xx% (enter percentage) of the early payment reduction that would otherwise apply to the benefits from dd/mm/yyyy (*enter date the benefits are payable from*).

**Award of additional pension (LGPS 2013 regulation 31)**

The employer in section 1 has agreed to allow additional pension to an active member of: £xxxxx (*enter amount*) per year.

There’ll be an early payment reduction applied to the pension if benefits are paid before the age of 65 on grounds other than permanent ill health.

**‘Switch on’ 85 year rule (LGPS 2014 transitional regulations Sch 2, para 2(2) & para 2(3))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to ‘switch on‘ the 85 year rule for a member voluntarily drawing benefits on or after the age of 55 and before the age of 60; and to *waive*, on compassionate grounds, the actuarial reduction applied to benefits from before 1 April 2014 membership. |  |
| The employer in section 1 has agreed to ‘switch on‘ the 85 year rule for a member voluntarily drawing benefits on or after the age of 55 and before the age of 60; A decision has been made *not to waive*, on compassionate grounds, the actuarial reduction applied to benefits from before 1 April 2014 membership. |  |

**Early retirement with employer’s consent**

**Current leaver plus deferred member whose last day of pensionable employment was on or after 1 April 2014 (LGPS 2013 regulations 30(8))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to waive any early payment reduction that may apply to the benefits, under Regulation 30(8). |  |

From dd/mm/yyyy (*enter date the benefits are payable from*).

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to waive xx% (*enter percentage*) of any early payment reduction that may apply to the benefits, under Regulation 30(8). |  |

From dd/mm/yyyy (*enter date the benefits are payable from*).

**Current leaver plus deferred member whose last day of pensionable employment was on or after 1 April 2008 (LGPS (BMC) regulations 30(2) & 30A(5))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed under regulation 30(2) to allow the application for payment of pension benefits. An early payment reduction may be applied to the benefits unless a decision to waive any reduction is also made. |  |

From dd/mm/yyyy (*enter date the benefits are payable from*).

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to waive, on compassionate grounds under regulation 30A(5), any early payment reduction that would otherwise apply to the benefits. |  |

From dd/mm/yyyy (*enter date the benefits are payable from* *if the member is aged 60 or over at that time*).

**Deferred member whose last day of pensionable employment was between 1 April 1998 and 31 March 2008 inclusive (LGPS regulations 1997 31(2), (5) & (7A))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed under regulation 31(2) to allow the application for payment of deferred pension benefits. An early payment reduction may be applied to the benefits unless a decision to waive any reduction is also made. |  |

From dd/mm/yyyy (*enter date the benefits are payable from*).

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to waive, on compassionate grounds under Regulation 31(5), any early payment reduction that would otherwise apply to the benefits. |  |

From dd/mm/yyyy (*enter date the benefits are payable from* *if the member is aged 60 or over at that time*).

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to allow payment of deferred pension benefits for a before 1 April 2008 optant out from age 65 before their employment ceases (employers listed in schedule 2 of the LGPS Regulations 1997 only). |  |

**Deferred member whose last day of pensionable employment was before 1 April 1998 (LGPS 1995 regulation D11(2)(c))**

| Question | Answer Yes/No |
| --- | --- |
| The employer in section 1 has agreed to allow early payment of deferred pension benefits on or after the age of 50 on compassionate grounds. **Please discuss this with us before making this decision for a member who is under the age of 55.** |  |

From dd/mm/yyyy (*enter date the benefits are payable from*).

By allowing early payment, any *early payment reduction is automatically waived in full*.

**Section 4: Authorisation**

Please apply the employer discretion above. I can confirm that I’m the authorised signatory on behalf of the employer. **I understand that there may be capital costs payable** to the Fund by the employer as a result of this decision, and that these will be collected in accordance with notified timescales. I’ve had sufficient information on the likely value of these capital costs and their collection to authorise this decision.

| **Question** | **Answer** |
| --- | --- |
| Name of person (with job title) or committee that made the decision: |  |
| Date of decision: |  |
| Name of authorised signatory (if different): |  |
| Phone number: |  |
| Signature: |  |
| Date: |  |

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