| **Cambridgeshire**  Pension Fund | **Northamptonshire**  Pension Fund |
| --- | --- |

# Local Government Pension Scheme – retirement form

Please use the retirement form guide whilst completing this form.

Once you’ve filled in the form, please either:

* **upload it** with all other required documents onto the member’s record on i-Connect. You can find instructions in the Employer i-Connect guide on our website; or
* **scan it** with all other required documents and **email** it securely to [pensions@westnorthants.gov.uk](mailto:pensions@westnorthants.gov.uk) documents.

## Section 1 - Employer details

| **Question** | **Answer** |
| --- | --- |
| Name of employer |  |

## Section 2 – Employee’s personal details

| **Question** | **Answer** |
| --- | --- |
| Surname |  |
| First name(s) |  |
| Title |  |
| Address |  |
| Postcode |  |
| Mobile number |  |
| Date of birth |  |
| NI number |  |
| Job title |  |
| Pay reference |  |
| Unique post reference |  |

## [Section 3](#Section3) – Employee’s leaving details

### Leaving date

| **Question** | **Answer** |
| --- | --- |
| Date left |  |

### Waiver of early payment reductions

| **Question** | **Answer Yes / No** |
| --- | --- |
| You’ve agreed to waive part or all the early payment reduction (this will incur a strain cost). Please attach a completed employer decision form. |  |

### Purchase order number

Please give us a purchase order number so we can raise an invoice for any costs for redundancy, business efficiency, flexible retirements, or waiver of an early payment reduction.

| **Question** | **Answer** |
| --- | --- |
| Purchase order number |  |

### Reason for leaving

Please confirm ‘Yes’ to one reason only (if applicable).

| **Question** | **Answer Yes / No** |
| --- | --- |
| Voluntary retirement 55+ |  |
| Voluntary retirement 55+ (you’ve agreed to waive part or all the early payment reduction\*) |  |
| Flexible retirement (if the employee has reduced their hours or moved to a less senior role at age 55+) |  |
| Redundancy 55+ |  |
| Business efficiency dismissal / end of contract by mutual agreement 55+ |  |
| Retirement 55+ with a settlement agreement |  |
| Ill-health dismissal **tier 1** ill-health pension awarded. Copy of the completed medical certificate and final medical report attached if not already supplied. |  |
| Ill-health dismissal **tier 2** ill-health pension awarded. Copy of the completed medical certificate and final medical report attached if not already supplied. |  |
| Ill-health dismissal **tier 3** ill-health pension awarded. Copy of the completed medical certificate and final medical report attached if not already supplied. |  |
| Age 75 (all members must have taken their pension by age 75) |  |

## [Section 4](#Section4) – Membership details, pensionable pay details and pension contributions

### CARE pay (2014 definition)

Please give the final year’s cumulative pensionable pay from 1 April to the date they left.

| **Question** | **Answer Yes/No** | **If yes – date applicable from** | **If Yes – cumulative pensionable pay / contractual payments / non contractual overtime / assumed pensionable pay (APP)** |
| --- | --- | --- | --- |
| Member of 50/50 section |  |  |  |
| Member of main section |  |  |  |
| Figure(s) include contractual overtime or allowances |  |  |  |
| Figure(s) include non-contractual overtime |  |  |  |
| Assumed pensionable pay (APP) for ill-retirement\* |  |  |  |

\* If the doctor has ticked B8 on the medical certificate, you should work the APP figure out on the pay the member would have had, if they had not been working reduced contractual hours.

Confirmation of the basic full-time equivalent pensionable pay rates in the last 3 financial years:

| **Basic pensionable pay rate period** | **Date from** | **Date to** | **Basic pensionable pay rate** |
| --- | --- | --- | --- |
| 1 |  |  | £ |
| 2 |  |  | £ |
| 3 |  |  | £ |

Confirmation of contractual overtime or allowances or non-contractual overtime paid in the last 3 financial years (1 April to 31 March):

| **Financial year** | **Date from** | **Date to** | **Total contractual overtime / allowances paid** | **Total non-contractual overtime pad** |
| --- | --- | --- | --- | --- |
| 1 |  |  | £ | £ |
| 2 |  |  | £ | £ |
| 3 |  |  | £ | £ |

Confirmation of non-pensionable deductions – annual leave bought in the last 3 financial years:

| **Annual leave period** | **Days bought** | **Total deduction** | **Date deduction from** | **Date deduction to** |
| --- | --- | --- | --- | --- |
| 1 |  | £ |  |  |
| 2 |  | £ |  |  |
| 3 |  | £ |  |  |

### Final pay (2008 definition)

This is only needed for employees that were born before 1998. Pension built up before 1 April 2014 is based on a member’s 2008 scheme definition of final pay (without non-contractual overtime). Please give the following:

* details of the final pay for the calendar year ending on the date they left, and.
* details of final pay in relation to a previous year, if higher.

| **Question** | **Answer Yes/No** | **If yes – calculated figure** | **If yes – date from** | **If yes – date to** |
| --- | --- | --- | --- | --- |
| Calculated final years pay to date they left\* |  | £ |  |  |
| Previous year’s final pay 1\* |  | £ |  |  |
| Previous year’s final pay 2\* |  | £ |  |  |

\*Please give details of the calculation of the final pay figure(s). There’s a final pay calculator on our website if you need help with this.

### Additional voluntary contributions (AVCs) details

Please confirm whether you’ve taken AVCs from your employee’s pay in the last 2 tax years.

| **Question** | **Answer Yes / No** |
| --- | --- |
| AVCs taken from employee’s pay in last 2 tax years |  |

If, yes, please fill in the table below.

| **Question** | **Answer** |
| --- | --- |
| Name of provider |  |
| Amount of last AVC deduction | £ |
| Date of last AVC deduction |  |
| Date last AVC paid to provider |  |
| Total of AVCs made in current year | £ |
| Total of AVCs made in previous year | £ |

[**Section 5**](#Section5) **– Employee’s contractual details**

Please give the current contractual details and any changes during the last year they worked for you.

| **Current / contractual change** | **Date from** | **Date to** | **Contractual hours worked (per week)** | **Contractual days / weeks paid per year** | **Full-time equivalent hours / weeks per year** |
| --- | --- | --- | --- | --- | --- |
| Current |  |  |  |  |  |
| Change 1 |  |  |  |  |  |
| Change 2 |  |  |  |  |  |
| Change 3 |  |  |  |  |  |

**Breaks in pensionable membership**

Please detail below any breaks in membership, wherethe member has not chosen to pay additional pension contributions:

| **Break in membership** | **Date from** | **Date to** | **Type of service break (additional, unpaid maternity, paternity or adoption leave, strike, absence with permission (except for sickness or injury))** |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

[**Section 6**](#Section6) **– Other jobs with you**

| **Question** | **Answer Yes / No** | **If no, name of job the employee is keeping** |
| --- | --- | --- |
| Are they leaving all employment with you |  |  |

If they’re not leaving all employment with you, please enter the details below.

| **Question** | **Answer Yes / No** | **If Yes, rate of pensionable pay in job they’re keeping / FTE rate of pensionable pay in job they’re keeping** |
| --- | --- | --- |
| Member retired on the grounds of flexible retirement |  |  |
| Concurrent employment |  |  |

## [Section](#Section3) 7 – Employer’s declaration

I confirm that the details provided are complete and correct.

| **Question** | **Answer** |
| --- | --- |
| Name |  |
| Job title |  |
| Contact phone number |  |
| Date |  |

The Cambridgeshire Pension Fund and Northamptonshire Pension Fund are a Data Controller under the General Data Protection Regulations. This means we:

* store;
* hold; and
* manage;

your personal data in line with legal requirements to provide you with pension administration services. To help us to follow these regulations, we need to share your information with certain bodies. We’ll only do so in limited circumstances. You can find more information about:

* how we hold your data;
* who we share it with; and
* what rights you have to ask for more information from us;

on the relevant websites below:

<https://pensions.cambridgeshire.gov.uk/>

<https://pensions.westnorthants.gov.uk/>

You can also ask us for this information in other languages and formats like Braille, large print, and CD.