

Transfer Form B Request for transfer information from previous pension provider

Information you need to know about the **Local Government Pension Scheme (LGPS)**

Scheme Administrator: Pensions Office, Town Hall and Civic Offices, Westoe Road, South Shields, NE33 2RL.

Scheme details: The Local Government Pension Scheme (LGPS) is a registered public service scheme under Chapter 2 of Part 4 of the Finance Act 2004 by virtue of Part 1 of Schedule 36 of that Act.

Career Average Revalued Earnings (CARE) scheme from 1 April 2014.

Scheme ceased to be contracted out on 5 April 2016. GMP Revaluation under Section 148 Orders
Tyne and Wear Pension Fund SCON - S2700177D ECON - E3900002R PSTR – 00327721RH

For completion by administrators / trustee managers of the former scheme then sent directly to former member together with all other transfer/accrued benefit information. **Please note:** a transfer can only be accepted from another registered pension scheme or from a European pensions institution. **Club Schemes** - please provide a transfer statement and confirm whether the member was subject to a Scheme earnings cap. (If your scheme participates in the LGPS you do not need to complete this form - simply attach a Summary of the member's details.)

N.B. If any of the relevant information is incomplete or is incorrect the transfer value will be returned. Please enclose all documentation for the transfer to proceed.

*Please complete in **black ink***

Name of member		
National Insurance Number		
Name and address of transferring scheme		
Type of Scheme Policy (e.g. COSR, COMP, COMB, APP, AVC, etc.)		
Member's Policy Number/Reference		
Total period of Membership (including any previous occupational pension scheme membership which form part of the policy. If dates are unavailable please state this).	From	To
If Scheme contracted out via GMP: Period of C/O employment	From	To
Total GMP (at date of leaving)	£	
Post 1988 GMP (not revalued)	£	
Total amount of Transfer Value Payable (excluding AVC's)	£	
Value of protected rights	£	
Total amount of Transfer Value included in above in respect of post 05.04.97 rights	£	
Value of any accumulated scheme AVC Fund	£	
Date Scheme AVC commenced		
Until what date is the Transfer Value guaranteed?		
Is the transfer value in respect of pension credit benefits that have been obtained as part of a pension sharing order? (If Yes - the transfer cannot proceed)	Yes / No	
Was the member subject to a Scheme earnings cap (If Yes - please provide details)	Yes / No	
Is the transfer value in respect of a remaining balance of the fund following a drawdown of a lump sum? (If Yes - please provide details)	Yes / No	
If you Scheme is an occupational pension scheme, have benefits in excess of GMP/Section (9)(2b) rights accrued since 17 May 1990 been equalised in accordance with overriding legislation? If Yes - will you indemnify the Fund to cover any loss if it were later found that the equalisation was insufficient? (If No - the transfer cannot proceed)	Yes / No	

Signed Date

For and on behalf of the Trustees / Managers / Administrators of the above Scheme.

Please treat this request as urgent as there are strict time limits for me to transfer previous pension rights into the LGPS.