

Hampshire Pension Fund  
administered by



Hampshire  
County Council

# **Local Government Pension Scheme (LGPS)**

## **Transfer information and forms**

### **Transfers from pension schemes outside of the LGPS**

This booklet is for general use so cannot cover every circumstance. It does not give you any rights under contract or statute law. LGPS rules will apply if there is any dispute over your pension.

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## Transferring benefits into the Hampshire Pension Fund

If you are an active member and have previous pension benefits, you may wish to transfer them into the Hampshire Pension Fund. Transfers must be made within your first year of LGPS membership in your current employment (unless your employer has a published policy to extend this). To investigate transferring previous benefits from outside the LGPS please follow these instructions.

Note: If your transfer is from a **Club** pension scheme e.g. Teachers' Pensions, NHS, Civil Service, Police, Fire etc. you **must** contact us before completing these forms.

1. Read this booklet and complete the transfer form that is at the back. Send Part A and Part B to your **previous** pension provider.



2. Your previous pension provider will send details directly to you. Send **all** of them including any discharge forms to Pensions Services – the address is on page 3.



3. Pensions Services will send an estimate of the extra service or pension amount your transfer will buy. We will not transfer any funds without your consent.



4. If you wish to go ahead with the transfer, send all the documents we have ticked on the estimate checklist to your previous pension provider.



5. When we receive payment from your previous provider we will send you a notice of the service or pension amount awarded.

### **What transfers should I use this booklet for?**

You should use this booklet to investigate transfers of pension rights from outside the LGPS, and for transfers from the LGPS in Scotland and Northern Ireland

### **What about previous LGPS membership?**

Do not use this form for previous LGPS membership in England and Wales, please use the 'LGPS Starter information – Booklet and forms' which is available from your employer or our website

### **Can previous pension rights always be transferred?**

In most cases a transfer can be made up to 12 months before your Normal Pension Age. The LGPS regulations do not allow us to accept

- Transfer of a pension in drawdown
- Partial transfer of a pension
- Transfers containing pension credits awarded under pension sharing orders.

### **What are the time limits?**

You have 12 months of joining the Hampshire Pension Fund to opt to transfer your previous pension benefits unless your employer permits otherwise in line with its policy. The transfer process can be lengthy and take several months so we recommend that you start investigating a transfer early in the 12 month window.

### **What must I do?**

For each previous scheme that you wish to transfer benefits from, ask your previous pension provider for a transfer value and associated discharge forms. To make things easy for you, complete **Part A** of the form in this booklet and send it with **Part B** to your previous pension provider.

### **What do I do with the transfer details?**

Send all the transfer information from your previous provider to Pensions Services as soon as you receive it. Include the discharge forms; we will not use them to transfer benefits without your permission.

Some transfer values have a 3 month guarantee and personal pension values change daily, so you must send us a **recent** transfer value (less than 1 month old). If the transfer value has expired, or is not recent, we may ask you for a new value. Your previous provider may charge you for repeat quotes. Do not send us an annual benefits statement – it does not include sufficient transfer details.

Our address is: Hampshire Pension Fund  
Hampshire County Council  
The Castle  
Winchester  
SO23 8UB

### **What happens next?**

We will send you an estimate of the extra service or pension amount your transfer will provide in the Hampshire Pension Fund.

You must then decide whether or not to go ahead. We cannot advise you so you may wish to consult an independent financial adviser.

### **What if I want the transfer to go ahead?**

Read the checklist we will send with your estimate. Complete the relevant forms and send them with the other documents requested to your previous pension provider.

You must send the forms and other documents to your previous pension provider within any guarantee period, if there is one, to take advantage of the guaranteed value.

### **When the transfer is complete**

We will write to you when we receive payment from your previous scheme, confirming completion of the transfer and include a formal notice of the service or pension amount credited to your LGPS pension account.

### **What if I do not have my previous provider's address?**

Write to the Pensions Tracing Service at:

The Pension Tracing Service  
The Pension Service  
Tyneview Park, Whitley Road  
Newcastle Upon Tyne  
NE98 1BA

Tell them as much as you can about the previous scheme or provider.

## Transfer form - Part A

Hampshire Pension Fund  
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Please send this to your previous pension provider  
with Part B



Hampshire  
County Council

Dear Pension Provider

I am considering transferring my pension rights with you into the Hampshire Pension Fund, part of the Local Government Pension Scheme (LGPS).

I have given my details below. Please provide the information requested overleaf, and enclose the discharge forms I will need if I wish the transfer to proceed. Send these to my address with a copy of this form so I can pass them to my new scheme.

### I. Personal details

Full Name \_\_\_\_\_ Title \_\_\_\_\_

Previous surname (if any) \_\_\_\_\_

Address \_\_\_\_\_

Postcode \_\_\_\_\_

National Insurance number

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Date of birth

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### Previous pension scheme

Name of previous scheme \_\_\_\_\_

Name of scheme administrators \_\_\_\_\_

Membership/policy number \_\_\_\_\_

Dates of membership From: \_\_\_\_\_ To: \_\_\_\_\_

**Club scheme members only** (see note on page 2)

Please select type of transfer value needed Club  Non Club

I consent to the disclosure of any additional information about my pension to the Hampshire Pension Fund.

Please do not send payment. I will contact you again if I want the transfer to proceed.

Signature \_\_\_\_\_ Date \_\_\_\_\_



Data protection: Pensions Services will only use your data to process your pension rights



## Transfer form - Part B

### To the Pension Provider

If you can offer a transfer value, please send the information requested below to the member with any discharge forms. Please make sure the information is dated. If the transfer value includes pre 1997 protected rights, you must include GMP details. We cannot accept any benefits arising from a pension share.

#### If you are an occupational scheme:

- Service dates on which benefit entitlement is based
- Contracted out employment dates, if different
- Weekly GMP to the leaving date and type of revaluation used, split pre and post 88
- Your PSTR number
- Transfer value, excluding any AVC fund
- AVC fund value, if any
- Post 1997 protected rights
- Value of current benefits
- Details of any pension sharing or earmarking orders

#### If you are a personal pension arrangement:

- Basis of your HMRC approval
- Your PSTR number
- Transfer value
- Details of any pension sharing or earmarking orders

#### About the Local Government Pension Scheme (LGPS)

The LGPS is a statutory scheme and became a registered pension scheme on 6 April 2006 in accordance with paragraph (1) of Schedule 36 to the Finance Act 2004.

<b>PSTR number</b>	PSTR00329946RE
<b>ECON</b>	E3900002R
<b>SCON</b>	S2700151E
<b>GMP revaluation rate</b>	Section 148 orders
<b>Scheme administrator</b>	Pensions Services, Hampshire County Council, The Castle, Winchester, SO23 8UB Phone: 01962 845588
Please regard this as authority to contact HM Revenue & Customs for confirmation of scheme status or related issues.	