



Transfer quote request form

If you are an LGPS member:

- fill in your details below
- sign and date this form, and
- send it to your previous pension provider straightaway.

Dear pension provider

I am thinking about transferring my pension rights with you to the Local Government Pension Scheme.

Please

- send me the information that is asked for on the next page to my **home address**, so I can deal with my new pension scheme direct
- do this **as quickly as possible** because I could get less transfer credit if I don't transfer within the LGPS time limits, and
- tell me if I or my new scheme have to fill in any forms for you or send you any documents.

WYPF will tell you how to pay the transfer value if I decide to go ahead.

Note that the LGPS can't accept a transfer if

- the pension rights are for a pension credit that results from a pension sharing order issued because of divorce, or
- any of the benefits have been crystallised.

Part **A** – my details

First name or names		
Last name		
Previous last name (if any)		
Title Mr, Mrs, Miss, Ms, other		
Are you married? Yes <input type="checkbox"/> No <input type="checkbox"/>		
Date of birth	Day.....	Month..... Year.....
National Insurance number		
Home address including postcode		
I was a member of your scheme from: Day..... Month..... Year..... to: Day..... Month..... Year.....		
Pension plan number		
The date I joined the LGPS Day..... Month..... Year.....		
I authorise you to give my new scheme any further information they need.		
Signature		Date

Part B

If you are the pension provider:

- please send me the information this form asks for (either fill in the form or print the information on a separate sheet. Tell me if I or my new scheme have to fill in any forms for you or send you any documents); and
- please reply to my home address.

Full title of pension scheme	
Address including postcode	
Type of scheme	
Basis of approval	PSTR
ECON	SCON
Transfer value (TV)	Date guaranteed to
AVC fund in addition to the TV	
Limited Revaluation Premium in addition to TV	
Details of any earmarking orders in force against the benefits	
Details of any bankruptcy orders in force against the benefits	
Is the member subject to the MPAA (money purchase annual allowance)? No <input type="checkbox"/> Yes (supply details) <input type="checkbox"/>	
Dates of scheme membership	
Guaranteed Minimum Pension at the date this person left the scheme	Pre 06.04.88 Post 05.04.88
Could the member take a refund of their contributions?	
No <input type="checkbox"/> Yes <input type="checkbox"/> If Yes: Gross refundable contributions	
Relevant contracted out earnings	
Signature Date	
Please print your name	
Job title Your phone number	

Notes

- The LGPS is a statutory scheme registered under Chapter 2 Part 4 of the Finance Act 2004
- It is a defined benefit (final salary) occupational scheme
- The Pension Scheme Tax Reference (PSTR) is 00329946RE (SF49/163)
- It is a member of the Public Sector

Transfer Inner Club

- It was contracted out until contracting out ended on 6 April 2016
- LGPS ECON E3900002R
- SCON WYPF – S2700179J
LPF – S2700159B
LB Hounslow – S2700117E
- Any Guaranteed Minimum Pension (which can be transferred in full) will be subsequently

revalued by Section 148 orders

Please don't send payment at this stage. When WYPF receives the transfer value information, they will tell the member how much transfer credit the transfer would buy. If the member decides to go ahead with the transfer, WYPF will ask you for payment. If you send payment before WYPF asks you to, they will return your payment.