

## Declaration of Previous Pension Rights

**LGPS 01**

This form should be completed by new members of the Avon Pension Fund.  
Please read the guidance notes before completing this form.

### PART A - Personal details

|                                |                      |                           |                      |
|--------------------------------|----------------------|---------------------------|----------------------|
| Surname                        | <input type="text"/> | Forename(s)               | <input type="text"/> |
| Date of birth                  | <input type="text"/> | National Insurance number | <input type="text"/> |
| Address                        | <input type="text"/> |                           |                      |
|                                | <input type="text"/> | Post Code                 | <input type="text"/> |
| Email address                  | <input type="text"/> |                           |                      |
| Name of Employing organisation | <input type="text"/> |                           |                      |

### PART B - Previous Public Service Pension and LGPS membership

|                                                                         |            |                          |                |           |                          |              |
|-------------------------------------------------------------------------|------------|--------------------------|----------------|-----------|--------------------------|--------------|
| <b>Have you ever paid into a Public Service Pension or LGPS before?</b> | <b>Yes</b> | <input type="checkbox"/> | Complete below | <b>No</b> | <input type="checkbox"/> | Go to PART D |
|-------------------------------------------------------------------------|------------|--------------------------|----------------|-----------|--------------------------|--------------|

You must declare this even if you do not wish to transfer your previous Public Sector and LGPS pension rights to Avon Pension Fund. Any previous LGPS membership may be automatically combined, unless you elect to keep it separate within 12 months of joining the Fund. We will write to you with your options.

If you were a member of the LGPS, Firefighters' Pension Scheme or Police Pension Scheme, please include the name of the relevant LGPS Pension Fund, Fire and Rescue Authority or Police Authority.

#### Previous Public Service Pension Scheme 1

|             |                      |          |                      |
|-------------|----------------------|----------|----------------------|
| Scheme name | <input type="text"/> |          |                      |
| Address     | <input type="text"/> |          |                      |
| Start date  | <input type="text"/> | End date | <input type="text"/> |

#### When you left this pension scheme which of the following actions did you take?

If your benefits were transferred, please confirm the name of the receiving scheme.

|                         |                          |                      |                          |                    |                          |
|-------------------------|--------------------------|----------------------|--------------------------|--------------------|--------------------------|
| Refund of contributions | <input type="checkbox"/> | Deferred my benefits | <input type="checkbox"/> | Received a pension | <input type="checkbox"/> |
| Transferred my benefits | <input type="checkbox"/> | Scheme name          | <input type="text"/>     |                    |                          |

## Previous Public Service Pension Scheme 2

|             |                      |          |                      |
|-------------|----------------------|----------|----------------------|
| Scheme name | <input type="text"/> |          |                      |
| Address     | <input type="text"/> |          |                      |
| Start date  | <input type="text"/> | End date | <input type="text"/> |

### When you left this pension scheme which of the following actions did you take?

If your benefits were transferred, please confirm the name of the receiving scheme.

|                         |                          |                      |                          |                    |                          |
|-------------------------|--------------------------|----------------------|--------------------------|--------------------|--------------------------|
| Refund of contributions | <input type="checkbox"/> | Deferred my benefits | <input type="checkbox"/> | Received a pension | <input type="checkbox"/> |
| Transferred my benefits | <input type="checkbox"/> | Scheme name          | <input type="text"/>     |                    |                          |

## PART C - Additional Voluntary Contributions (AVCs) in connection with your LGPS membership

|                                                         |     |                          |                |    |                          |              |
|---------------------------------------------------------|-----|--------------------------|----------------|----|--------------------------|--------------|
| Did you pay an inhouse AVC whilst a member of the LGPS? | Yes | <input type="checkbox"/> | Complete below | No | <input type="checkbox"/> | Go to PART D |
|---------------------------------------------------------|-----|--------------------------|----------------|----|--------------------------|--------------|

|                  |                      |
|------------------|----------------------|
| LGPS Fund        | <input type="text"/> |
| Provider name    | <input type="text"/> |
| Provider address | <input type="text"/> |

When you transfer LGPS main scheme benefits, any inhouse AVC funds are normally transferred alongside these.

## PART D - Previous Personal or Occupational pension scheme membership

|                                                 |     |                          |                |    |                          |              |
|-------------------------------------------------|-----|--------------------------|----------------|----|--------------------------|--------------|
| Have you ever paid into another pension scheme? | Yes | <input type="checkbox"/> | Complete below | No | <input type="checkbox"/> | Go to PART E |
|-------------------------------------------------|-----|--------------------------|----------------|----|--------------------------|--------------|

### Previous Pension Scheme 1

|                          |                      |          |                      |
|--------------------------|----------------------|----------|----------------------|
| Scheme name              | <input type="text"/> |          |                      |
| Address                  | <input type="text"/> |          |                      |
| Membership/Policy Number | <input type="text"/> |          |                      |
| Start date               | <input type="text"/> | End date | <input type="text"/> |

### When you left this pension scheme which of the following actions did you take?

|                         |                          |                         |                          |
|-------------------------|--------------------------|-------------------------|--------------------------|
| Refund of contributions | <input type="checkbox"/> | Deferred my benefits    | <input type="checkbox"/> |
| Received a pension      | <input type="checkbox"/> | Transferred my benefits | <input type="checkbox"/> |

## Previous Pension Scheme 2

|                          |                      |          |                      |
|--------------------------|----------------------|----------|----------------------|
| Scheme name              | <input type="text"/> |          |                      |
| Address                  | <input type="text"/> |          |                      |
| Membership/Policy Number | <input type="text"/> |          |                      |
| Start date               | <input type="text"/> | End date | <input type="text"/> |

### When you left this pension scheme which of the following actions did you take?

|                         |                          |                         |                          |
|-------------------------|--------------------------|-------------------------|--------------------------|
| Refund of contributions | <input type="checkbox"/> | Deferred my benefits    | <input type="checkbox"/> |
| Received a pension      | <input type="checkbox"/> | Transferred my benefits | <input type="checkbox"/> |

## PART E – Declaration

---

I declare that:

- The information I have provided is correct and accurate to the best of my knowledge.
- I have listed above all periods of membership with any other Local Government Pension Schemes and Public Sector Pension schemes.

|                   |                      |      |                      |
|-------------------|----------------------|------|----------------------|
| Full name (Print) | <input type="text"/> | Date | <input type="text"/> |
|-------------------|----------------------|------|----------------------|

**If you have other scheme benefits not detailed above, please confirm these separately below.**

### Please return this form to Avon Pension Fund by:

Email: [avonpensionfund@bathnes.gov.uk](mailto:avonpensionfund@bathnes.gov.uk)

Post: Bath & North East Somerset Council, Lewis House, Manvers Street, Bath BA1 1JG

**Avon Pension Fund, Local Government Pension Scheme administered by Bath & North East Somerset Council.**

**How we use your personal data:** We use the information you give us on this form to manage your pension and deal with your request. More information about how we use and protect personal data, including your rights, is available in our Privacy Notice on our website at: [www.avonpensionfund.org.uk](http://www.avonpensionfund.org.uk)

## Declaration of Previous Pension Rights notes

---

### **Please read these notes carefully before completing this form.**

As a new employee you will automatically join the Local Government Pension Scheme (LGPS) and payroll will deduct pension contributions from your pay.

All LGPS administrators need to keep a record of each member's previous pension rights with other LGPS or Public Service Pension schemes.

You must confirm if you have any period of employment with the following employers. This will help us give you your correct options and ensure any protections are correctly recorded.

- Local Government - England, Scotland or Wales
- The Civil Service
- The Judiciary
- The Armed Forces
- Teachers
- The National Health Service
- Police
- Fire and Rescue

### **Transferring pension rights into the Local Government Pension Scheme (LGPS)**

If you have previously paid into another approved pension scheme before you joined Avon Pension Fund, you can request to have the benefits accrued in your previous schemes transferred into the LGPS.

You may be able to transfer pension rights into the LGPS from:

- a previous LGPS Fund (including inhouse AVC Funds)
- an occupational pension scheme
- a personal pension plan
- a stakeholder pension scheme
- Other public sector schemes (known as club scheme transfers)

**Please note:** You cannot transfer a pension credit into the LGPS. A pension credit is a share of an ex-spouses or ex-civil partner's pension benefits, as awarded by a Court under a Pension Sharing Order, or by a qualifying agreement in Scotland, following a divorce or a dissolution of a civil partnership.

### **If you have previous LGPS pension rights**

- If you re-join the LGPS and have a deferred refund from an earlier period of membership, your previous pension rights must be automatically aggregated with your new membership
- If you re-join the LGPS and have a deferred benefit from an earlier period of membership, your previous LGPS pension rights may be automatically aggregated with your new membership
- If you wish to retain separate benefits, you must elect to do so within 12 months.
- If you have had a break in active membership of a public service pension scheme of more than 5 years, you must elect to aggregate your previous pension rights with your new membership.

### **If you have pension rights in a non-LGPS arrangement**

You must apply within 12 months of joining the LGPS to elect to transfer in previous non-LGPS pension rights.

If you wish for us to investigate a transfer of any earlier pension benefits you hold, you will need to complete and return our transfer enquiry authorisation form (LGPS01A). Please complete a separate form for each scheme.