

Avon Pension Fund

Local Government Pension Scheme

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

Web: www.avonpensionfund.org.uk

Tel: 01225 395100

Email: avonpensionfund@bathnes.gov.uk

Fax: 01225 395258



Nomination of cohabiting partner for survivor's pension

LGPS 19A

If you are married or in a civil partnership **do not** complete this form as your spouse will automatically receive a survivor's pension in the event of your death.

First read the notes overleaf. If you wish to proceed, use **BLOCK CAPITALS** to give details about yourself and your partner as requested below.

YOUR DETAILS

SURNAME: _____ FORENAME(S): _____

DATE OF BIRTH: _____ NI NUMBER: _____

HOME ADDRESS: _____

EMAIL ADDRESS: _____

NAME OF EMPLOYING ORGANISATION: _____

I nominate my partner named below to receive a nominated cohabiting partner's pension under the Local Government Pension Scheme in the event of my death

SURNAME: _____ FORENAME(S): _____

DATE OF BIRTH: _____ NI NUMBER: _____

HOME ADDRESS: _____

SCHEME MEMBER'S SIGNATURE: _____ DATE: _____

On your death, partners benefits would be paid to your nominated co-habiting partner if your nominated cohabiting partner satisfies us that the below conditions had been met for a continuous period of at least 2 years immediately prior to your death:

- you have been able to marry or form a civil partnership¹;
- you have lived together as if you were husband and wife or civil partners²;
- neither of you have been living with someone else as if you were husband and wife or civil partners;
- your financial affairs have been interdependent (or the nominated partner has been financially dependent upon the scheme member)

¹ A civil partnership is a relationship between two people of the same sex ("civil partners") which is formed when they register as civil partners of each other.

² For these purposes, two people of the same sex are to be regarded as living together as if they were civil partners if they would be regarded as living together as husband and wife if they were not of the same sex.

³ A nomination ceases to have effect if-

(a) either you or your nominated partner gives us written notice to cancel the nomination, or

(b) you make a subsequent nomination under this regulation, or

(c) either you or your nominated partner marries, forms a civil partnership or lives with a third person as if they were husband and wife or as if they were civil partners, or

(d) your nominated partner dies before you

NOMINATION OF COHABITING PARTNER FOR SURVIVOR'S PENSION EXPLANATORY NOTES

Benefits payable on the death of a member of the Local Government Pension Scheme (LGPS) include pensions for children, for a surviving spouse or civil partner⁴ and, provided the Scheme member paid into the LGPS on or after 1 April 2008, for a cohabiting partner.

You can nominate a cohabiting partner, of either opposite or same sex, with whom you have not entered into marriage or formed a civil partnership.

On your death, your partner will be entitled to a cohabiting partners pension provided that for a continuous period of at least two years immediately prior to your death:

- both you and your nominated co-habiting partner are, and have been, able to marry each other or form a civil partnership with each other, and
- you and your nominated co-habiting partner have been living together as if you were husband and wife, or civil partners, and
- neither you or your nominated co-habiting partner have been living with someone else as if you/they were husband and wife or civil partners, and
- either your nominated co-habiting partner is financially dependent on you or you are financially interdependent on each other⁵

The pension for a surviving cohabiting partner is based on your LGPS membership from 6th April 1988 or later if you became a member after that date. However, if you have membership before 6th April 1988 you can elect to pay additional contributions in respect of any period before that date so that it can be used in the calculation of your nominated partner's pension. Any such election must be made within 12 months of the date of signing this form.

On your death, partners benefits would be paid to your co-habiting partner if your nominated cohabiting partner satisfies us that the above conditions had been met for a continuous period of at least 2 years immediately prior to your death.

You and your co-habiting partner should be aware that on your death we may have to verify that the conditions have been satisfied. We may do this by, for example, asking for confirmation that you lived in a shared household with shared household spending, or your partner may be asked to demonstrate that you had a bank account or mortgage in joint names. There would be a right of appeal if we decide not to pay a pension and your partner believes that he/she has entitlement.

Data Protection Act 1998: Personal information contained on this form will be held on computer files and/or relevant filing systems for the purpose of administering the Local Government Pension Scheme. This information will only be shared with third parties for the purpose of providing the appropriate service or meeting legislative requirements. In particular information will if requested be shared in connection with the National Fraud Initiative.

**Remember to let us know of a change in your circumstances which could affect the nomination,
or if you wish to cancel it.**

When completed, the nomination form should be returned to:

Avon Pension Fund, Bath & North East Somerset Council,
Lewis House, Manvers Street, Bath, BA1 1JG

⁴ A civil partner is a person in a relationship between two people of the same sex ("civil partners") which is formed when they register as civil partners of each other.

⁵ Your partner is financially dependent on you if you have the higher income. Financially interdependent means that you rely on your joint finances to support your standard of living. It doesn't mean that you need to be contributing equally. For example, if your partner's income is a lot more than yours, he or she may pay the mortgage and most of the bills, and you may pay for the weekly shopping.