

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



Lifetime Allowance - Details of Benefits from other Registered Pension Schemes LGPS 21

Local Government Pension Scheme Regulations (as amended)

MEMBER NAME: _____

DATE OF BIRTH: _____ N.I. NUMBER: _____

Why do I need to complete this form?

In order for the Pensions Department to assess whether or not you have exceeded the Lifetime Allowance, as you have stated that including your pension from the LGPS, on the date that this pension commences the total of your pension(s) from all registered pension schemes in payment exceeds £35,000 per annum. You **must** declare all pension entitlements (**excluding** state pensions and any dependent's pension that you may be in receipt of) that you have, this includes:

- current membership of any pension arrangement
- a refund that has not been claimed
- a deferred benefit (a benefit that is not yet in payment)
- a pension or pensions in payment
- a pension credit

PART A – Pensions in Payment

Pensions already in Payment before 6 April 2006 - If you were receiving a pension from any source (excluding any state pensions and dependent's pension) that started before 6 April 2006, please tell us the value of your annual pension **at 6 April 2006**, before any tax deductions.

Name of pension scheme/provider	Annual pension before tax (Value at 6 April 2006)
	£
	£

Pensions which commenced after 5 April 2006 - Please enter the capital value of any pension benefits at retirement, the date of retirement and the percentage of LTA used. If you do not have this information you should contact your pension provider.

Name of pension scheme/provider	Capital value of benefits at retirement	Date of retirement	% of LTA used
	£		
	£		

PART B – Pensions not yet in Payment

Pensions from other arrangements that have not yet come into payment, including other Local Government Pension Scheme benefits - Please enter details of any other pension benefits you hold elsewhere that have yet to come into payment. Your pension provider will be able to provide you with the current value and percentage of lifetime allowance used.

Name of pension scheme/provider	Current capital value	% of LTA used
	£	
	£	

PART C – Declaration

I certify that the information I have provided is correct and complete to the best of my knowledge. If any of the information provided is proven to be incorrect then I understand that I will be wholly and personally liable for any tax changes due and any resultant penalty as may be imposed by Her Majesty's Revenue and Customs.

SIGNED: DATE:

Data Protection: Avon Pension Fund is a Data Controller under the General Data Protection Regulations. We store, hold and manage your personal data in line with statutory requirements to provide you with pension administration services. For more information about how we hold your data, who we share it with and what rights you have to request information from the Fund, visit www.avonpensionfund.org.uk/privacy-notice