

Avon Pension Fund

Local Government Pension Scheme

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Bath & North East
Somerset Council

for you, for now, for the future
lgps
2014



Avon Pension Fund – Local Government Pension Scheme

Schedule of charges

Charges applicable from 01/04/2017

Introduction

Avon Pension Fund provides a range of pension benefit information services for members of the Local Government Pension Scheme (LGPS). Where there is a legislative requirement to provide the information requested then it is provided free of charge.

Current legislation permits the Fund to recover costs for the provision of additional services therefore provision of certain information is subject to administrative charges.

This schedule shows the current administrative charges applied by Avon Pension Fund for the provision of information and services that are chargeable. The charges are inclusive of VAT at the standard rate and these charges are reviewed annually by the Avon Pension Fund.

Payment methods

Where charges apply for any service requested, Avon Pension Fund must receive the payment in full before the requested information can be provided.

To pay please enclose a cheque made payable to 'Bath and North East Somerset Council' posted to the address at the top of this schedule. Please return the cheque with the Estimate Request Form and write your National Insurance number and surname on the reverse of the cheque.

Alternatively, you can pay electronically through online banking. The bank account details for payments by electronic payment (BACS) are as follows:

Account name: Avon Pensions Income Suspense A/C
Sort code: 56 00 34
Account number: 32113722
Quoting reference: EST/(insert your National Insurance number here)

Avon Pension Fund Schedule of charges
(where a charge applies this is inclusive of VAT)

Effective from April 2017

Estimated benefits request	Comments	Charge applicable
Produce annual pension benefit statement	Statement posted to member and/or available online at: www.avonpensionfund.org.uk/my-pension-online	No charge
Produce estimate of pension benefits	Members can produce own estimates online at: www.avonpensionfund.org.uk/my-pension-online	No charge
Produce estimate of pension benefits	Estimate request if member within 12 months of retiring	No charge
Produce estimate of pension benefits	Estimate request if member is outside the above criteria	£48 per each individual request
Additional estimate of pension benefit requests	Applicable if further estimate requests are made within 12 months of first quote	£48 per each individual request
Multiple requests for pension benefit requests	Above criteria applies to a single date or age request. Multiple dates/ages will incur multiple charges.	£48 per each individual request
Transfer value request	Comments	Charge applicable
Produce full Cash Equivalent Transfer Value (CETV) quotation for divorce or transfer out	Standard annual entitlement under disclosure of information regulations	No charge
Additional CETV quotations	Applicable if a further CEV quote is requested within 12 months of first quote	£241.27 for each quote for member not yet retired £191.10 for retired member
Provision of other information	If under disclosure of information regulations Otherwise, depending on nature of request	No charge Up to £291.33
Objections to order by scheme	Onus should be on the party drafting the order to ensure that it is correctly drafted prior to issue	Costs for dealing with inoperable orders will be passed on