

MY PENSION CHOICE – NEW ENTRANTS TO SCHEME

Pensions

WHAT YOU MUST DO - Complete Section A and B in all cases
 If you wish to join the Pension Scheme also complete Section C and D

Section A - (please complete in all cases and return to your employer BLOCK CAPITALS)

SURNAME: MAIDEN NAME:

FIRST NAME(S) TITLE (Mr/Mrs/Miss/Ms)

HOME ADDRESS:

.....

DATE OF BIRTH: NI NUMBER

(verified: initials of checker)

EMPLOYER DEPARTMENT

JOB TITLE EMPLOYEE NO (if existing employee)

DATE OF COMMENCEMENT IN ABOVE JOB

MARITAL STATUS (single/married/divorced/separated/co-habiting/civil partnership)

DATE OF MARRIAGE/CIVIL PARTNERSHIP (if applicable)

DATE OF DIVORCE (if applicable)

SPOUSE'S/PARTNER'S FULL NAME

SPOUSE'S/PARTNER'S DATE OF BIRTH

Section B (to be completed in all cases) (Tick)

I wish to join the Local Government Pension Scheme

Signature Date

Section C If you have any previous pension rights please provide the details below:-

| Name and Address of Pension Provider and Identity Number (if known) and Job Title | Period of Service | | Please tick the appropriate box below, indicating what action you wish taken with these rights:- |
|---|-------------------|----|--|
| | From | To | |
| | | | <input type="checkbox"/> (a) you would like transfer details <input type="checkbox"/> (b) your pension rights are to be preserved <input type="checkbox"/> (c) your contributions were refunded <input type="checkbox"/> (d) your pension benefits are in payment |
| | | | |
| | | | |
| | | | |
| | | | |

Please attach details of any other relevant information on a separate sheet.

I wish to consider the possibility of transferring my pension benefits to the Local Government Pension Scheme administered by Scottish Borders Council. I, therefore, **authorise details of the transfer value** available to be released to the administrators of the Scottish Borders Council Pension Fund.

Signature: Date:

Do you contribute to an Additional Voluntary Contribution (AVC) Scheme? **YES/NO**

If **YES** Name of Scheme

Section D - Death Grant – Expression of wish

If you die while a current or retired member of the Pension Scheme, a lump sum is payable. This lump sum is called a Death Grant. If you are in employment when you die, the death grant would be equal to three times your final pay. If you have retired, the death grant is equal to five years pension less any pension paid up to date of death. You can nominate a person(s) or organisation(s) to whom the money should be paid. This will help to speed up the payment of the death grant.

In the event of my death, I wish that any death grant, which may be payable under the Local Government Pension Scheme (Scotland) Regulations to be paid to the following person(s) –

Please use BLOCK capitals:-

| Full name | Relationship (if any) | Address | Proportion % |
|-----------|-----------------------|---------|--------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Please ensure that the proportion of death grant you have detailed equals 100%

I understand that Scottish Borders Council is not bound by this nomination.

I understand that any nomination form, which I submit to Scottish Borders Council in the future, will supersede this nomination.

Signature

Date:

NOTES

- ❖ Your nomination must be on this form or on a Scottish Borders Council Death Grant Expression of Wish form.
- ❖ You can nominate more than one person or organisation but you must say how much money you want to go to whom. e.g. brother 60%, sister 40%(the total must be 100%)
- ❖ You can change or cancel your nomination at any time but you must do this by completing a new form. Scottish Borders Council will provide further forms on request.
- ❖ If you get married after making a nomination, you must fill in a new form to confirm or change the nomination.
- ❖ If Scottish Borders Council has been unable to pay the death grant to the nominees within 2 years of your death, it will be paid to your estate.
- ❖ The administrators of the scheme are not bound by any nomination made, however, they will have to take account of the member’s wishes. In most cases it is expected that the wishes of the member would be followed.

The main benefits of the facility to nominated beneficiaries is that death gratuities can be paid more quickly, and where payment is not made to the member’s estate, will exempt the payment from inheritance tax.

Please return this form to the Pensions Team, HR Shared Services, Scottish Borders Council, Council Headquarters, Newtown St Boswells, TD6 OSA (Tel: 01835 825205 or 01835 826577)