

# Membership Form

(All fields marked\* must be completed)



## Section 1 Your Personal & Employment Details

(Please enclose copies of your birth and marriage certificates)

Title* (Mr/Mrs/Miss/Ms)	<input type="text"/>	Forename(s)*	<input type="text"/>	Surname*	<input type="text"/>
Date of Birth*	<input type="text"/>	National Insurance Number*	<input type="text"/>		
Address*	<input type="text"/>				
	<input type="text"/>				
	<input type="text"/>				
Post Code*	<input type="text"/>				
Email	<input type="text"/>	Telephone	<input type="text"/>	Home	<input type="text"/>
				Work	<input type="text"/>
Status*	<input type="text"/>	(Single/Married/Civil Partnership/Dissolved Civil Partnership/Widowed/Cohabiting)			
Employer*	<input type="text"/>		Payroll Number	<input type="text"/>	
Address*	<input type="text"/>				
	<input type="text"/>				
	<input type="text"/>				
Post Code*	<input type="text"/>				
Job Title*	<input type="text"/>	Membership Start Date*	<input type="text"/>		

## Section 2 Your Previous Membership of the Local Government Pension Scheme (LGPS)

Have you ever paid into the LGPS before?\*

Yes

COMPLETE  
BELOW

No

GO TO  
SECTION 3

### Previous Local Government Pension Fund 1

LGPS Fund	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Post Code	<input type="text"/>
Start Date	<input type="text"/>
End Date	<input type="text"/>

Which of the following actions did you take when you left?

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits

### Previous Local Government Pension Fund 2

LGPS Fund	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Post Code	<input type="text"/>
Start Date	<input type="text"/>
End Date	<input type="text"/>

Which of the following actions did you take when you left?

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits

### Previous Local Government Pension Fund 3

LGPS Fund	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Post Code	<input type="text"/>
Start Date	<input type="text"/>
End Date	<input type="text"/>

Which of the following actions did you take when you left?

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits

**Merseyside Pension Fund will contact your previous Pension Fund(s) for details and contact you as soon as possible.**

### Section 3 Other Pension Arrangements

Have you ever paid into another pension scheme?\*

Yes

COMPLETE  
BELOW

No

GO TO  
SECTION 4

#### Previous Pension Scheme 1

Name

Address

Post Code

Membership/Policy Number

Start Date

End Date

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

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits\*\*

\*\*Please tick if you would like to find out about transferring deferred benefits into this Fund (1 year time limit applies)

#### Previous Pension Scheme 2

Name

Address

Post Code

Membership/Policy Number

Start Date

End Date

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

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits\*\*

\*\*Please tick if you would like to find out about transferring deferred benefits into this Fund (1 year time limit applies)

#### Previous Pension Scheme 3

Name

Address

Post Code

Membership/Policy Number

Start Date

End Date

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

Took a refund

Transferred my benefits

Received a pension

Deferred my benefits\*\*

\*\*Please tick if you would like to find out about transferring deferred benefits into this Fund (1 year time limit applies)

### Section 4 Additional Voluntary Contributions (AVCs)

Have you ever paid AVCs before?\*

Yes

COMPLETE  
BELOW

No

GO TO  
SECTION 5

AVC provider

Address

Post Code

Which type of AVC did you pay into?

Scheme AVC

Free-standing AVC (top-up pension)

In-house AVC (LGPS)

Free-standing AVC (non-LGPS)

Please tick if you would like to find out about transferring this AVC into the Fund?

### Section 5 Your Declaration and Signed Authority

The details on this form are correct to the best of my knowledge. Failure to complete this form correctly may affect my future benefits. I authorise the schemes involved to provide Merseyside Pension Fund with any information required.

Signature\*

Date\*

# Membership Form

## Supplementary Notes

- Please enclose copies of your birth and marriage certificates
- Please keep us informed if you change address
- Please quote your National Insurance number in correspondence
- Please quote your preferred email address – this can be your home or work address

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

If you have previously paid into a company, occupational, personal pension scheme or an Additional Voluntary Contributions (AVC) arrangement before you joined Merseyside 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
- an occupational pension scheme
- a self-employed pension plan
- a buy-out policy
- a personal pension plan
- a stakeholder pension scheme
- an Additional Voluntary Contribution arrangement

#### **PLEASE NOTE:**

You cannot transfer a pension credit into the LGPS. A pension credit is a share of an ex-spouse's 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 will be automatically aggregated with your new membership
- If you wish to retain separate benefits, you must elect to do so within 12 months, unless your employer allows you longer. This is an employer discretion and you should check their policy on this matter
- 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, unless your employer allows you longer. This is an employer discretion and you should check their policy on this matter.

Please complete and return your Membership Form to:  
**Merseyside Pension Fund, Castle Chambers, 43 Castle Street, Liverpool L2 9SH**