MEMBER ENQUIRY FOR FLEXIBLE RETIREMENT

For Office Use:

FILE NO.

A pension from the LGPS is usually only payable if you leave employment. Flexible retirement allows a member to remain employed and receive some or all of their LGPS pension benefits. However this must coincide with a reduction in pay and agreement from the employer. An employer may have conditions to apply: level of reduction and/or time span

Complete this form to request flexible retirement with (your employer) ………….. You need to complete the entire form before sending to (your employer) ………………… to consider/approve. Before completing this form you should read your employer’s flexible retirement policy.

This form is not a guarantee of receiving Flexible Retirement benefits, but a way to find out if flexible retirement is possible. Your employer has the discretion to accept or refuse your request.

Your pension is split into 4 parts:

1. Pension built up before 1st April 2008
2. Pension built up between 1st April 2008 and 31st March 2014
3. Pension built up after 31st March 2014
4. Additional pension benefits such as Additional Pension Contributions and Additional Regular Contributions.

If your flexible retirement request is successful, your employer ……. will advise you of the decision. You have to take all of the benefit based your Pre 2008 membership, however although the regulations provide you with the choice to take all, some or none of the three remaining parts, the administering authority Oxfordshire County Council Pension Fund, awaits guidance how that proportioning should be assessed, (employer to indicate on template if restrictions from your policy apply). You will have to confirm how much you wish to take for each of the remaining three parts of your pension.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Full Name |  | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | |
| NI Number |  |  | |  | |  | |  | |  | |  | |  | |  | |
|  | | | | | | | | | | | | | | | | | |
| Date of Birth | | |  | |  | |  | |  | |  | |  | |  | |  |
|  | | | D | | D | |  | | M | | M | |  | | Y | | Y |
| Home Address | Post Code: | | | | | | | | | | | | | | | | |
| Job title |  | | | | | | | | | | | | | | | | |

Dear employer,

I would like to enquire whether I can reduce my pay (either by reduction in hours or seniority) and start receiving my pension benefits (otherwise known as flexible retirement) from:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| D | D |  | M | M |  | Y | Y |

I wish to consider taking the following percentages of my pension:

|  |  |
| --- | --- |
| Pension built up between 1st April 2008 and 31st March 2014? | % |
| Pension built up after 31st March 2014? | % |
| Any Additional Benefits? | % |

SIGNED: DATE: