



**Important:** Please read the instructions below first before you complete this form.

**Who should complete this form?**

If you joined the LGPS in your current employment less than 12 months ago, you do not need to complete this form as you do not require your employer's consent to transfer in previous pension. However, if you joined the LGPS in your current employment more than 12 months ago, your employer must give their consent before you can investigate a transfer of previous pension. The decision to allow a transfer in after the initial 12 months in employment is at your employer's sole discretion. Before completing this form, you may wish to ask your employer for a copy of their discretionary policy on allowing late transfers.

**Instructions for completing this form**

You must complete section 1 of the form in full before forwarding it to your employer to complete section 2. The person who completes section 2 must have the authority to approve a late transfer on behalf of your employer. Please contact your HR department to find out where you should send your form. Sending this form to the incorrect place could delay your request. If you want to investigate the transfer of more than one pension, you should use a separate form for each. Incomplete or inaccurately completed forms will not be processed. If you are completing this form electronically, please ensure the font size does not fall below 12pt. You can insert a digital signature if you download this form and open the form using Adobe. The digital signature must be your actual signature. Do not print.

**Next steps**

If your employer gives permission for the transfer to proceed, they should inform you and then send us a copy of the completed the form. However, we will not be able to take any action on the transfer until you send us the Cash Equivalent Transfer Value (CETV) in respect of your previous pension rights. This should be an official statement on headed paper. More information about the transfer process can be found on [our website](#). Employer permission is valid for 12 months only. If the transfer takes longer than 12 months to complete, you will need to obtain a further completed form from your employer. Unless you have opted-out, we will communicate with you about the transfer using our self-service portal, 'my pension online'. If you have not already done so, you can register now at: [ms.buckinghamshire.gov.uk](https://ms.buckinghamshire.gov.uk)

**If you have further questions, please contact: The Pensions & Investments Team,  
Buckinghamshire Council, Walton Street Offices, Aylesbury, HP20 1UD  
Email: [pensions@buckinghamshire.gov.uk](mailto:pensions@buckinghamshire.gov.uk) Member helpline: 01296 383755**

**Section 1 – To be completed by the LGPS member**

This section should be completed by the LGPS member. Please ensure you read the above instructions before completing this form. If you have more than one employment, you will have more than one pension account. Please only provide details of the employment you wish the transfer in to be associated with.

**Full name**

**Address**

**Email address**

**Date of birth**

**Name of employer**

**Job title**

**Payroll number**

**National insurance number**

**Date you joined the LGPS under the above role**

**Name of previous pension provider**

**Why are you applying for the transfer after the 12-month window? (Use a separate sheet if needed)**

**Signed – A digital signature is acceptable as long as it an actual signature and not a typed name.**

**Date (dd/mm/yy)**

## **Section 2 – To be completed by the employer**

This section should be completed by the LGPS employer. The above member wishes to investigate a transfer of previous pension rights into their LGPS pension. However, as they joined the LGPS in their current role over 12 months ago, they require their employer's permission to proceed with the transfer application. Please provide the information below and return the completed form to the Pensions and Investments Team either via i-Connect or by email to [pensions@buckinghamshire.gov.uk](mailto:pensions@buckinghamshire.gov.uk). We will not be able to accept the form if it is forwarded to us by the member. Note: The upfront cost to you is nil, however, you will take on any future liabilities associated with the additional pension, as set out in the [Funding Strategy Statement](#). This includes where the employer is liable to meet the cost of an early retirement (pension strain). Please refer to the [Roles and Responsibilities](#) document for more details.

**Name of person completing this form**

**Job title**

**On behalf of your organisation, do you give consent for the member to proceed with the transfer of pension rights as stated on this form?**

Yes No

**Declaration -** By signing below I can confirm that:

- Section 1, the LGPS member's section, was fully completed by the employee when I received the form
- I am the person authorised to make decisions about allowing late transfers in
- I understand that by accepting the transfer, my organisation agrees to accept pension liabilities in respect of the transfer
- In making the decision I have considered my organisations' LGPS discretionary policy
- Where consent has been provided, it has been done so on the condition that the transfer is completed within 12 months of the date below

**Signed – A digital signature is acceptable as long as it an actual signature and not a typed name.**

**Date (dd/mm/yy)**