



This form should be used by employers requesting an estimate of pension benefits and any applicable pension strain costs. Before completing this form, please note the following:

- Employers are entitled to two free estimates per scheme member in any rolling 12-month period. Any additional estimates can be provided at a cost of £15.00 plus VAT.
- Incomplete or inaccurately completed forms will be returned and the request will not be processed.
- This form is for an estimate only. It does not provide notice of an actual retirement. Actual retirements will only be processed when all applicable paperwork is received.
- In cases where a member has pre 1 April 2014 service, and a pension strain is payable, we may request additional final pay calculations for members who have had a drop-in pay.
- Employers are required to have discretionary policies for employer consent and flexible retirement. We are unable to supply these types of estimates if the employer does not have one in place.

This form should be returned to pensions@buckinghamshire.gov.uk. Please see the [roles and responsibilities document](#) for more information. If you have any questions about completing this form, please contact your ELO or email employers@buckinghamshire.gov.uk

Scheme member's personal details

Full Name

Date of Birth

National Insurance Number

Payroll Number

Employer

Proposed retirement details

Proposed Last Day of Service

Reason for retirement (tick one only)

- Retirement (age 55+)
- Redundancy/Efficiency (age 55+)
- Ill-health retirement Tier 1
- Ill-health retirement Tier 2
- Ill-health retirement Tier 3
- Flexible (age 55+ - discretionary policy required)
- Employer consent to switch on 85-year rule (age 55-60 - discretionary policy required)

Estimated pay information

Cumulative Pensionable Pay (CPP) for the period from 1 April to the proposed last day of service
(E.g. Last Day of Service 24 August 2020, CPP provided for 1 April 2020-24 August 2020)

Cumulative Pensionable Pay (CPP) for the previous scheme year 1 April – 31 March
(E.g. Last day of service 24 August 2020, CPP provided is for 1 April 2019-31 March 2020)

Final pay (members with service before 1 April 2014 only)

Please provide a final pay figure ([2008 definition](#))

(E.g. Last day of service 24 August 2020, final pay calculation is for period 25 August 2019-24 August 2020)

APP (ill-health requests only)

If the estimate is for an ill-health retirement, please provide a full year's Assumed Pensionable Pay (APP)

AVC options

Please tick this box if the member has an AVC fund and you require the maximum tax-free cash option including AVCS

Scheme employer's information

Name of person requesting the estimate (printed name not signature)

Organisation

Job title

Email address that the quote should be sent to

Any other comments