

# Expression of wishes nomination of a beneficiary



If you die while a current or retired member of the Local Government Pension Scheme a lump sum may be payable. If you are in still in employment when you die, a lump sum equal to three times your final pay will be paid. If you retired on or before 31 March 2009 a death grant equal to five years pension less any pension paid up to date of death will be paid. If you retired on or after 1 April 2009 this is doubled to ten years.

Please read the notes overleaf on making a nomination for payment of the lump sum death grant carefully before making a nomination.

## To the Pension Administrator:

In 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) or organisation(s):

Full name	Address	Relationship	% of death gratuity

Please continue list on a separate sheet if required.

Please check that the proportion of death grant you have detailed totals 100%.

Title ..... Surname ..... First name(s).....  
(Mr/Mrs/Miss/Ms/other)

Status..... Maiden name..... Date of birth .....  
(Single/married/widow(er)/divorced/registered civil partnership/dissolved civil partnership)

National Insurance no ..... e-mail .....

Home address .....

..... Post code .....

Employer ..... Department.....

I understand that Lothian Pension Fund is not bound by this nomination.  
 I understand that this nomination will be cancelled by any future nomination form.  
 This nomination form cancels any previous nomination form.

Signature ..... Date.....

## **Notes on making a nomination for payment of lump sum death grant**

- Payment is made at the discretion of Lothian Pension Fund. (This allows payment to be free of inheritance tax.)
- Your nomination must be on the form provided by Lothian Pension Fund.
- You can nominate more than one person or organisation but you must say how much money you want to go to each, for example: 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. Ask your employer or Lothian Pension Fund for further forms.
- If you get married, form a registered civil partnership or your marriage or partnership ceases after making a nomination, you must fill in a new form to confirm or change the nomination. If Lothian Pension Fund has been unable to pay the death grant to the nominees within two years of your death, it will be paid to your executors.
- Although your nomination will normally be respected, Lothian Pension Fund has the discretion not to accept it.
- A death grant paid to a nominee will not be subject to inheritance tax.
- You may only make a nomination for the death grant, not for any pension which may be payable to your spouse(s), civil partner(s) or child(ren) on your death under scheme rules.
- You do not have to make a nomination but it is in your best interest to do so and, having made one, to keep it up to date.

## **Nomination of cohabiting partner**

If you paid contributions after 1 April 2009 you can also nominate a co-habiting partner to receive a survivor's pension in the event of your death. You have to meet certain conditions and complete a form – contact us for more details or download a form from our website: [www.lpf.org.uk](http://www.lpf.org.uk)



# New entrant form



If you wish to join the Local Government Pension Scheme please complete sections A and B in BLOCK CAPITALS. Please return the completed form to your personnel section. You should enclose your birth certificate and, if you are married or in a registered civil partnership, your marriage or partnership certificate and spouse's or partner's birth certificate.

If you **do not** wish to join the Scheme please complete sections A and C in BLOCK CAPITALS then return the completed form to your personnel section.

## **Section A** TO BE COMPLETED BY ALL NEW EMPLOYEES, WHETHER JOINING THE SCHEME OR NOT

Title ..... Surname ..... First name(s) .....  
(Mr/Mrs/Miss/Ms/other)

Status ..... Maiden name ..... Date of birth .....  
(Single/married/widow(er)/divorced/registered civil partnership/dissolved civil partnership)

National Insurance no ..... Employer Department .....

Home address .....

E-mail ..... Post code .....

## **Section B** TO BE COMPLETED IF YOU WISH TO BECOME A MEMBER OF THE LOCAL GOVERNMENT PENSION SCHEME

I wish to become a member of the Local Government Pension Scheme and confirm that the details I have given in section A are correct.

### **PREVIOUS PENSION RIGHTS** Section B(ii)

Have you been a member of any other pension schemes? Yes  No

If yes, give the name and address of the administrators of your previous pension scheme or attach a separate sheet of paper if necessary.

Name .....

Address .....

..... Post code .....

Period of service from ..... to ..... Identity or reference number (if known) .....

Please tick the appropriate box to say what you want us to do with your pension rights from the other scheme.

**Any transfers must be requested within 12 months of joining Lothian Pension Fund.**

- I authorise Lothian Pension Fund to request details of transferring my pension rights.
- I wish to preserve my pension rights.
- My contributions were refunded.
- I am receiving a pension from my previous pension scheme.

Do you contribute to Additional Voluntary Contributions/Added Years/Additional Regular Contributions? Yes  No

Please let us know if you have any special requirements for communications sent to you.

Signature ..... Date .....

You will receive confirmation of membership and a scheme booklet within four weeks of joining the Scheme.

Please turn over and continue completing the form.

**PAYMENT OF LUMP SUM DEATH GRANT** Section B(iii)

If you die while a current or retired member of the Local Government Pension Scheme a lump sum may be payable. If you are in still in employment when you die, a lump sum equal to three times your final pay will be paid.

If you have retired a death grant equal to ten years pension less any pension paid up to date of death will be paid.

**Notes on making a nomination for payment of lump sum death grant**

- Payment made at the discretion of Lothian Pension Fund. (This allows payment to be free of inheritance tax.)
- Your nomination must be on the form provided by Lothian Pension Fund.
- You can nominate more than one person or organisation but you must say how much money you want to go to each, for example: 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. Ask your employer or Lothian Pension Fund for further forms.
- If you get married, form a registered civil partnership or your marriage or partnership ceases after making a nomination, you must fill in a new form to confirm or change the nomination.
- If Lothian Pension Fund has been unable to pay the death grant to the nominees within two years of your death, it will be paid to your executors.
- Although your nomination will normally be respected, Lothian Pension Fund has the discretion not to accept it.
- A death grant paid to a nominee will not be subject to inheritance tax.
- You may only make a nomination for the death grant, not for any pension which may be payable to your spouse(s) or child(ren) on your death under scheme rules.
- You do not have to make a nomination but it is in your best interest to do so and, having made one, to keep it up to date.

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

Full name	Address	Relationship	% of death gratuity

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

I understand that Lothian Pension Fund is not bound by this nomination.

I understand that this nomination will be superseded by any nomination form which I submit to Lothian Pension Fund in future.

This nomination form cancels any previous nomination form.

Signed .....Date.....

**Nomination of cohabiting partner**

You can also nominate a co-habiting partner to receive a survivor’s pension in the event of your death. You have to meet certain conditions and complete a form – contact us for more details or download one at our website: [www.lpf.org.uk](http://www.lpf.org.uk)

**Section C** TO BE COMPLETED IF YOU **DO NOT WISH** TO BECOME A MEMBER OF THE LOCAL GOVERNMENT PENSION SCHEME

After careful consideration, I have decided not to become a member of the Local Government Pension Scheme. I understand that I am still required to contribute to a pension scheme but this will either be towards the State Second Pension or a personal pension plan.

Signed..... Date.....

To all employees: please check that you have completed and signed all relevant sections, then return this form to your personnel section.

**Section D** TO BE COMPLETED BY THE EMPLOYER

To the employer's authorised representative: if the employee decides to join the Scheme, please verify the employee's birth certificate and, where appropriate, the marriage or partnership certificate and spouse's or partner's birth certificate. Please complete in BLOCK CAPITALS, ticking appropriate box where applicable.

Please note: all new employees, except casual employees and employees who choose not to join within the first pay period, are automatically members of the Scheme.

Employer ..... Department.....

**Details of New Employee**

Surname ..... First name(s).....

Status..... Employee number..... National Insurance number .....  
(Single/married/widow(er)/divorced/registered civil partnership/dissolved civil partnership)

Date of birth ..... Verified by (initials).....

Spouse's or partner's full name.....

Spouse's or partner's date of birth..... Verified by (initials).....

Date of marriage or partnership ..... Verified by (initials).....

Job title .....

Part-time: Part-time pay..... Hours/week.....

Full-time equivalent pay ..... Full-time equivalent hours/week .....

Full-time: Full-time or sessional pay..... Sessional: Weeks/year .....

Date employment began ..... Date joined pension scheme .....

Rate of contribution .....

Authorised signature..... Date.....

Please return the completed form to: Lothian Pension Fund, Level 3/3, Waverley Court, Level 3/3, 4 East Market Street, Edinburgh EH8 8BG



Waverley Court Level 3/3 4 East Market Street Edinburgh EH8 8BG  
Tel: 0131 529 4638 Fax: 0131 529 6229 e-mail: [pensions@lpf.org.uk](mailto:pensions@lpf.org.uk) Web: [www.lpf.org.uk](http://www.lpf.org.uk)