

## REQUEST TO INVESTIGATE A TRANSFER

Name.....	Date of Birth .....
Address.....	
National Insurance No.....	Email/phone.....
Employer Name.....	Payroll Number.....

Use this form to request the investigation of the possible transfer of your non-LGPS pension rights to the Essex Pension Fund. Please read the important notes overleaf before you complete this form.

Pension Scheme Name:	
Address:	
Post Code:	Phone Number:
Policy Number:	Dates from:                      to:

Pension Scheme Name:	
Address:	
Post Code:	Phone Number:
Policy Number:	Dates from:                      to:

Pension Scheme Name:	
Address:	
Post Code:	Phone Number:
Policy Number:	Dates from:                      to:

**I authorise my previous pension providers listed above to release any information relevant to the possible transfer of my pension rights to the Essex Pension Fund.**

Signed:.....	Dated.....
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Data Protection: Essex County Council (as the Administering Authority of the Fund) is a Data Controller under the General Data Protection Regulations. We store, hold and manage your personal data in line with statutory requirements to provide you with pension administration services. For more information about how we hold your data, who we share it with and what rights you have to request information from the Fund, see the Forms and publications section of our website [www.essexpensionfund.co.uk](http://www.essexpensionfund.co.uk).

## Important Notes

- This form is **not** an election to transfer. It allows the Essex Pension Fund to request information from your previous pension providers so that we can issue you with a transfer quotation, and you will then need to decide whether to proceed with the transfer.
- **A transfer request must normally be submitted within 12 months of joining (or re-joining) the LGPS. Your employer may extend this time limit in exceptional circumstances, and you should check what their policy is before making a request outside this period.**
- It is **not** possible to transfer in a Pension Credit awarded as a result of a Pension Sharing Order issued following a divorce or dissolution of a civil partnership.
- You can transfer a non-LGPS linked AVC or FSAVC fund into your LGPS pension account, however you **cannot** transfer them into the in-house AVC scheme.
- Please ensure that you provide up to date contact details for your other pension scheme(s). If you need help finding pensions from your previous employments, you can use the Department of Work & Pensions (DWP) free pension tracing service which is available on their website [www.gov.uk/find-pension-contact-details](http://www.gov.uk/find-pension-contact-details).

Please visit the websites [www.essexpensionfund.co.uk](http://www.essexpensionfund.co.uk) and [www.lgpsmember.org](http://www.lgpsmember.org) for more information about the LGPS.

Return your completed form to:

**Essex Pension Fund  
Seax House  
County Hall  
Chelmsford  
Essex  
CM1 1QH**

**Phone: 03330 138384  
Email: [pensionenquiries@essex.gov.uk](mailto:pensionenquiries@essex.gov.uk)**