

TRIVIAL COMMUTATION REQUEST FORM



Local Government Pension Scheme (LGPS)

Kent Pension Fund

You should complete this form if you are a member who is in receipt of their pension from the Kent Pension Fund, and who believes they meet the requirements to request that their small pension is converted to a one-off cash lump sum.

A dependant (spouse, civil partner, cohabiting partner or child) of a deceased member of the Kent Pension Fund should not complete this form as the requirements are different, they should contact us by using the contact form on our website, www.kentpensionfund.co.uk

You should complete, print, sign and return the form to us.

Information to be included

Include all pension benefits received, or due to be in payment. Do not include State pension.

If you are not sure about the information needed on this form

In most cases, you can obtain the information from the provider or administrator of the relevant pension arrangement. Please do not send any supporting documents from other pension arrangements at this time.

Your personal details

National Insurance number

Surname

Forename(s)

Title

Telephone number (including area code)

Home Address (including postcode)

Personal email address

Please select section A or B and follow instructions:

SECTION A

I **do not** have other pension benefits already in payment or due for payment, other than this LGPS pension and the state pension

Start at
question 5

SECTION B

I **do** have other pension benefits already in payment or due for payment, other than this LGPS pension and the state pension
(including any Serious Ill Health Lump Sums, Uncrystallised Funded Pension Lump Sums and Stand Alone Lump Sums already paid)

Start at
question 1
and
answer all
questions

1	I am in receipt of pension benefits that were in payment before 6 April 2006 <u>only and</u> have no other pension benefits paid on or after 6 April 2006	Yes	No
If 'Yes' please provide details below			
	Pension provider	Current annual rate of pension in payment (before tax)	
Pension 1		£	
Pension 2		£	
Pension 3		£	

If you have more than 3 pensions, please attach an extra sheet

2	I am in receipt of pension benefits that commenced payment on or after 6 April 2006 and before 6 April 2024 (and either do or do not have any other benefits in payment before 6 April 2006)			Yes	No
If 'Yes' please provide details below for your benefits taken between 6 April 2006 and 6 April 2024 only					
	Pension provider	Date benefit was taken (date of retirement)	Value of annual pension at date benefit was taken (before tax)	Value of any lump sum taken at this date	
Pension 1			£	£	
Pension 2			£	£	
Pension 3			£	£	

If you have more than 3 pensions, please attach an extra sheet

2A	I have a transitional tax-free amount certificate and I confirm I will return a copy of the certificate with this completed declaration	Yes	No
Please include a copy of the certificate with this form			

3	I am in receipt of pension benefits that commenced payment on or after 6 April 2024	Yes	No	
If 'Yes' please provide details below				
	Pension provider	Date benefit was taken (date of retirement)	Value of annual pension at date benefit was taken (before tax)	Value of any lump sum taken at this date
Pension 1			£	£
Pension 2			£	£
Pension 3			£	£

If you have more than 3 pensions, please attach an extra sheet

4	I have pension benefits that are due to commence payment in the future			Yes	No
If 'Yes' please provide details below					
	Pension provider	Date payment due	Current value of annual pension	Current value of any lump sum	
Pension 1			£	£	
Pension 2			£	£	
Pension 3			£	£	

If you have more than 3 pensions, please attach an extra sheet

5	I have had pension benefits trivially commuted (converted) to a one-off lump sum		Yes	No
If 'Yes' please provide details below				
	Pension provider that commuted your pension	Amount of one-off lump sum	Date benefit was taken (nominated date)	
Pension 1		£		
Pension 2		£		
Pension 3		£		

If you have more than 3 pensions, please attach an extra sheet

Please tick this statement if it is true:

6	I have not transferred pension benefits out of the LGPS within the last 3 years	
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Please tick this statement if it is true:

7	I am not a controlling director, or connected to a controlling director, of a company that participates in the LGPS in England and Wales	
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After completing this form please read the declaration, sign and date:

8	Declaration and signature		
I certify that the information provided above is correct and completed to the best of my knowledge. If further tax becomes payable because the information I have given proves to be incorrect, then I understand that I am wholly and personally liable for the tax charge due and any resultant penalty that may be imposed by HMRC.			
Signature		Date	

Please download, sign, date and return this form to Kent Pension Fund, Kent Count Council, Chief Executive's Department, Invicta House, Maidstone, Kent ME14 1XX

Privacy notice

In order to administer the pension scheme, we collect, hold, process and share personal data. For further information read our privacy notice on the Kent Pension Fund website –

www.kentpensionfund.co.uk/privacynotice