



Request to Participate - Employer request to participate in L&G Master Trust

To be completed by a department wishing to participate in CSVACs, Partnership or Concord. The scheme set up process takes two-three months minimum. Contributions should not be taken from members until the scheme set up has been completed.

If you wish to set up more than one of the schemes, for example CSAVCs and Concord, you will need to complete a form for each scheme.

Employer name (Full legal name)

Registered address

Postcode

Legal status of employer (tick those which are applicable)

Civil Service Department

Charity

Limited Company

Public Limited Company

Other (Please specify)

Employer status in Civil Service Pensions (tick those which are applicable)

Civil Service

New Fair Deal

Schedule 1

Schedule 25 (5)

Do you currently participate in any schemes under the Master Trust?

(tick those which are applicable)

CSAVCS

Partnership

Concord

We do not currently participate in the Master Trust

Scheme you wish to participate in within the Master Trust

(tick those which are applicable)

CSAVCS

Partnership

*Concord

Additional information is required when making an application to join Concord, please see below.

Date to join the scheme

The date you choose will be drafted into the deed of participation and must be adhered to.

This date must be on the 1st of the month at least one complete month in advance.

Date contributions are first deducted from employees

Contributions should not be deducted until the scheme has been set up. If contributions have been deducted then all requests from Legal & General must be responded to promptly to ensure the scheme can be set up without delay.

For Concord only

The Concord pension account can be provided for people who do not qualify for membership of the alpha or partnership. Contribution rates are set by the employer but must comply with Automatic Enrolment legislation.

Contribution Rates

Employer Contribution Rate	%
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Employee Contribution Rate	%
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Please confirm the reason you wish to use Concord and how many employees/workers will be enrolled.

Please specify the definition of pensionable salary

In order to participate in the L&G Master Trust the employer must complete a Deed of Participation. So that the deed can be provided, please confirm the execution details required in order to allow you to execute a legally binding deed.

Please note: Civil Service Pensions cannot provide guidance on your organisational requirements and recommend that you refer the matter to your legal adviser.

Number of signatories required

Signatory 1

Name

Job Title

Signatory 2

Name

Job Title

Signatory 3**Name****Job Title****Signatory 4****Name****Job Title**

Will the signatory/signatories sign on their own authority or under delegated authority?

Yes

No

If Yes please specify the delegation:

Will you use a seal?

Yes

No

Supplementary Notes:

1. The deed is a Deed of Participation in a Pension Master Trust and is written under English Law.
2. For Public Sector Organisations we can confirm that the principles established in the case of *Carltona vs. Commissioner of Works 1943* can be applied; however, we ask that the Official(s) should hold a Senior role and that the role held is relevant to the transaction.
3. If you have an execution block available, please provide this.
4. Email the completed form to DC.Provider@cabinetoffice.gov.uk
5. Late payment of pension contributions may result in the employer being reported to The Pension Regulator.



By signing below you agree to adhere to the scheme set up date and respond to all requests from Legal & General without delay.

Signature

Print Name

Contact Email

For Cabinet Office use only

Date Received

Date Checked (Initial + date)

+

Date sent to Legal & General