
Pension Switching – Important notes



If you are switching from partnership to classic / classic plus / premium / nuvos or alpha, you can only join the scheme you are eligible for, and your eligibility may have changed after 1 April 2015, when the alpha scheme was introduced.

If you rejoin a scheme at a later date any preserved pension you built up will be subject to the rules for people rejoining the scheme.

You can only switch once in a 12 calendar month period.

If you are eligible for the classic scheme

More info:

www.civilservicepensionscheme.org.uk/members/classic/

If you are eligible for the classic plus scheme

More info:

www.civilservicepensionscheme.org.uk/members/classic-plus/

If you are eligible for the premium scheme

More info:

www.civilservicepensionscheme.org.uk/members/premium

If you are eligible for the nuvos scheme

More info:

www.civilservicepensionscheme.org.uk/members/nuvos

If you are eligible for the alpha scheme

More info:

www.civilservicepensionscheme.org.uk/members/alpha-guide

If you are eligible for the partnership pension scheme

More info:

www.civilservicepensionscheme.org.uk/members/partnership-csavic-stakeholder/

Pension Switch form

You can use this form to switch between partnership and the other scheme you are eligible to join. Your employer will be able to help if you are not sure which scheme you are currently in, or which scheme you can switch into. You can find a Quick Start guide to switching here: www.civilservicepensionscheme.org.uk/quickstart

You can switch schemes at any point during the year, but, you must send your completed form to your employer at least two months before the date you will switch. You will usually switch on the first day of a month.

Please complete sections 1, 2, and 3, and then either section 4 (if you are switching from partnership) or section 5 (if you are switching to partnership). Then you must sign the declaration at section 6 before returning this form to **your employer** to complete section 7.



Remember to:

- use black ink, and CAPITAL LETTERS
- add your National Insurance (NI) number on each page
- confirm your eligibility with your employer
- sign and date the declaration.

Your choice to switch is recorded when your form is received, however your contributions (and your scheme) will not change until after the switch date. If you need an update on your application to switch schemes, you should contact your employer.

Section 1 - Your personal details

Full name	<input type="text"/>
Current address and postcode	<input type="text"/> <input type="text"/>
Your pension scheme (circle one only)	classic/classic plus/premium /nuvos / alpha /partnership
Telephone number	<input type="text"/>
Email address	<input type="text"/>

To ensure all your information is linked to your record, please include your:

NI number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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Section 2 - Your Civil Service Pensions history

Have you been a member of any Civil Service Pensions arrangements before (including previous membership of the classic, classic plus, premium, nuvos, or alpha schemes or the partnership pension account) your current period of employment?

Do not include details of your current arrangements. Continue on a separate sheet if needed. If yes, please complete this section.

If no, move on to [section 3](#).

I have been a member before	<input type="checkbox"/>	I have not been a member before	<input type="checkbox"/>
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Main scheme information

Date from	Date to	Where did you work?	What happened to your pension? (see list below)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

A: No pension benefits

C: Pension transferred out

E: Took early retirement

B: Pension is preserved

D: Pension now in payment

F: Other (give details)

Partnership pension account information

Date from	Date to	Where did you work?
<input type="text"/>	<input type="text"/>	<input type="text"/>

To ensure all your information is linked to your record, please include your:

NI number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 3 - Your pension switch

If you want to switch from partnership to classic, classic plus, premium, nuvos, or alpha you must only tick the scheme you are eligible for.

If you are not sure which of the schemes you can join, please check with your employer. Picking a scheme you are not eligible for may cause a delay with your pension switch.

Go to section:

I would like to switch to Only select the scheme you are eligible to join	classic	<input type="checkbox"/>	4
	classic plus	<input type="checkbox"/>	4
	premium	<input type="checkbox"/>	4
	nuvos	<input type="checkbox"/>	4
	alpha	<input type="checkbox"/>	4
I would like to switch to partnership		<input type="checkbox"/>	5

Section 4 - I want to switch to classic/ classic plus/ premium/ nuvos/ alpha from partnership

Please complete this section if you want to switch to classic/classic plus/premium/nuvos/ alpha from partnership.

After changing schemes you may be able to transfer benefits into your new pension. This could be, for example, pension benefits from another period of employment, a personal pension scheme, or from your current partnership pension account.

Please note: time limits may apply.

Please contact me about the possibility of transferring in other pension benefits

Go to www.civilservicepensionscheme.org.uk for more information about your pension, taking control of your retirement planning, and pensions for dependants.

Now complete [section 6](#)

To ensure all your information is linked to your record, please include your:

NI number





Section 5 - I want to switch to partnership from classic/ classic plus/ premium/ nuvos/ alpha

I would like to join the following partnership provider (please tick one only)

Scottish Widows	<input type="checkbox"/>	Standard Life	<input type="checkbox"/>
I have completed and enclosed an application for my chosen provider			<input type="checkbox"/>
I would like to contribute	<input type="checkbox"/>	% of my pensionable earnings	

More information about partnership can be found at:
www.civilservicepensionscheme.org.uk/members/partnership-csavic-stakeholder

Now complete [section 6](#)

Section 6 - Your declaration

I understand that:

- I can only switch schemes once per 12 calendar months.
- I must return my completed switch form at least two months before the switch date.
- I can only switch to schemes I am eligible for, and have confirmed the choice I have made with my employer.

Your signature: _____ Date: ____/____/____

To ensure all your information is linked to your record, please include your:

NI number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 7 - Pension Switch form - Employer section

As the **employer** you must complete this section of the request, to confirm that you have taken action to switch the member to or from partnership on the date shown below. Please fully complete this page and return all pages of this form along with any additional documents to: **Civil Service Pension Scheme, PO Box 2017, Liverpool, L69 2BU**



Remember to:

- use black ink, and CAPITAL LETTERS
- add your National Insurance (NI) number on each page
- confirm your eligibility with your employer
- sign and date the declaration.

For information on your role and responsibilities, please see the Employer Pension Guide: www.civilservicepensionscheme.org.uk/employers/employer-pension-guide

Employer authorisation

By completing this form, I confirm:

- we have noted the member's request
- we have informed our payroll department to amend the member's contributions from the relevant date
- the member's pension record will be updated via the interface
- if the member is switching to partnership, a completed application has been sent to the relevant partnership provider

My full name	<input type="text"/>
My job title	<input type="text"/>
Telephone number	<input type="text"/>
Email address	<input type="text"/>
Date of the switch	<input type="text"/>

My signature: _____ Date: ____/____/____

To ensure all your information is linked to your record, please include your:

NI number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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