



Pension switching form

If you are a member of **alpha**, you can use this form to request to switch to the **partnership** scheme.

If you are already a member of the **partnership** scheme, you can use this form to request a switch to **alpha** (subject to eligibility).

Please read **Section 6 - Guidance notes** before you complete this form.

- You will need to complete **Section 1 and Section 4** and then either:
- **Section 2** (if you are switching from your current scheme to **partnership**); or
- **Section 3** (if you are switching from **partnership** to another scheme).

Please complete this form in black ink and return it to your employer's HR or Payroll department.

Section 1 - Your personal details

Your name

Your address

Postcode

Your current pension scheme
(tick one only)

alpha

partnership

Your telephone number

Your email address

Your National Insurance (NI) number

Section 2 - I want to switch from alpha to partnership

Please confirm the following:

I want to switch to the partnership scheme

I have completed and enclosed my Partnership Pension Account Application form

Now complete **Section 4 – Your declaration**

Section 3 - I want to switch from partnership to alpha

Please confirm:

I want to switch to the alpha scheme

After switching schemes, you may be able to transfer benefits into your new pension from another period of employment, a personal pension scheme, or from your current **partnership** pension account.

Please note that time limits may apply to the transfer in of your benefits.

If you would like us to contact you with information about transferring in other pension benefits, please tick

Now complete **Section 4 – Your declaration**

Section 4 - Your declaration

By completing this section, I am confirming the following:

- I understand that I can only switch schemes once per 12 calendar months.
- I can only switch to a scheme I am eligible to join and I have confirmed with my employer my eligibility to switch.
- I have completed and returned my switching form to my employer's HR or Payroll department at least two months before the planned switch date.

Your signature

Date

Civil Service Pensions is committed to managing your data in line with the Data Protection Legislation. For more information about how your data is managed, please visit the Privacy Policy page on our website: www.civilservicepensionscheme.org.uk



Section 5 – Employer authorisation (this section is to be completed by your employer)

Please confirm that the member will be able to switch to or from **partnership** on the date shown below.

For more information about switching, please see Section 5.9, '**Changing Pension Arrangements**' of the Employer Pension Guide, which is available on our website: www.civilservicepensionscheme.org.uk

By completing this section, you are confirming the following:

- You have noted the member's request to switch.
- You have informed your payroll department to amend the member's contributions from the date provided.
- The switch date is at least **two months** after the received date.
- The member's pension record will be updated via the Standard Monthly Interface.
- A completed **Partnership Pension Account Application form** has been sent to the **partnership** provider (if the member is switching to **partnership**).

Your full name

Your job title

Your telephone number

Your email address

**Date you received the
member's forms**

Date of the switch

Your signature

Date

For information about your role and responsibilities as a participating employer in the Civil Service Pension Scheme, please see the Employer Pension Guide page of our website: www.civilservicepensionscheme.org.uk

Section 6 – Guidance notes.

- 1 Members of **alpha** can request to switch to the **partnership** scheme.
- 2 Members of the **partnership** scheme can request to switch to **alpha**, subject to eligibility.
- 3 You can only switch schemes once per 12 calendar months. You will usually switch on the first day of a month.
- 4 If you're switching to the **partnership** scheme, you must complete and return the **Partnership Pension Account Application** form. You can download the form from the Forms page on our website: www.civilservicepensionscheme.org.uk
- 5 You have confirmed with your employer your eligibility to switch.
- 6 Your employer **MUST** receive your completed forms **at least two months** before the date you want to switch, or it will delay the date you are able to switch.
- 7 If you rejoin the alpha scheme later on, any preserved pension you have built up will be subject to the scheme rules. For example, if you move back into alpha after five years, you will break the final salary link to any legacy scheme (classic, classic plus, premium and nuvos).
- 8 You can find out more information about the Civil Service Pensions in the scheme guides that can be found on the Publications page on our website: www.civilservicepensionscheme.org.uk