



# Pension Questionnaire

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**It is important that you fully complete, and return, this Pension Questionnaire.**

**Incomplete or incorrect information could result in you being enrolled into the wrong scheme and affect the benefits that you are entitled to.**

Please answer the questions on the following pages.

Your employer will use your answers to work out which of the Civil Service Pension Schemes you can join. Try to answer the questions as accurately as you can.

Once you have completed this questionnaire return it as soon as possible and we'll let you know what your pension choices will be.

Make sure you add your National Insurance (NI) number at the top of each page.

## Section 1 - Your personal data

**Your full name**

**Your National Insurance number**

**Your date of birth**

**Your start date**

## Section 2 - Your pension information

Have you ever been a member of a public service pension scheme? Public services employers include the Civil Service, judiciary workers, teachers, members of the armed forces, fire and rescue services, the police, health service workers, and local government employees. You can find more information at:

[www.legislation.gov.uk/ukpga/2013/25/schedule/1](http://www.legislation.gov.uk/ukpga/2013/25/schedule/1)

Answer this question with details of your latest period of pension scheme membership.

	Which scheme?	At which employer?	What date did you leave?	Sections to complete
	Civil Service pension arrangements			3, 4, 5, 7
	By-analogy* Civil Service pension arrangements			3, 4, 5, 7
	Other public service pension			6, 7
	No - I have never been a public service pension scheme member			Section 7 only

\*By-analogy schemes are almost identical to the main civil service arrangements, but may have slightly different terms or rules.

If you are unsure if your scheme was by-analogy, a full list can be found on our website at [www.civilservicepensionscheme.org.uk](http://www.civilservicepensionscheme.org.uk)

## Section 3 - Previous Civil Service Pension information

### Which Civil Service Pension Scheme were you a member of?

Please give us details of your latest period of pension scheme membership.

alpha

classic

classic plus

premium

nuvos

partnership – I joined before 30 July 2007

partnership – I joined on or after 30 July 2007

### How do I find this information?

If you are not sure which of these applies to you, the statement you received when you left the scheme should have your scheme information on it, and should show what 'terms' applied to you when you left.

This information will be shown on the pension letter that confirmed the amount of pension benefits you had built up.

If after checking your letter you're still not sure, you should contact the scheme.

**[www.civilservicepensionscheme.org.uk](http://www.civilservicepensionscheme.org.uk)**

## Section 4 - Previous Civil Service Pension information

**Why did you leave?** Tick the reason why your latest period of Civil Service (or by-analogy) pension scheme membership ended.

	<b>Resigned with less than two years' service.</b> Your contributions were probably refunded
	<b>Resigned with more than two years' service.</b> You built up pension rights; you may have received a preserved pension
	<b>Dismissed on inefficiency, or Fixed Term Appointment ended with less than two years' service.</b> You may have received some compensation, and your contributions were probably refunded
	<b>Dismissed on inefficiency, or Fixed Term Appointment ended with more than two years' service.</b> You may have received some compensation and a preserved pension
	<b>Approved early retirement (AER)</b> Your pension was paid before your NPA, but not enhanced or reduced
	<b>Early retirement (ARR)</b> Your pension was paid before your NPA, but reduced for early payment
	<b>Ill-health retirement</b> Your pension was paid on medical grounds
	<b>Age retirement</b> Your pension was paid at or after your NPA
	<b>Civil Service Compensation Scheme 'Early Exit' (pre-2010 terms)</b> You left on a flexible or compulsory early severance or early retirement
	<b>Civil Service Compensation Scheme 'Early Exit' (post-2010 terms)</b> You left on a Voluntary Exit, or Voluntary or Compulsory Redundancy

### What is my Normal Pension Age (NPA)?

NPA is the age when you can retire from a scheme, and claim your pension without it being reduced for early payment.

NPA in classic, classic plus, and premium is age 60.

In nuvos, NPA is age 65.

In alpha the NPA is the higher of age 65, or your State Pension age.

Some people have a personal NPA, usually linked to a TUPE transfer. If this is the case it will be shown on your pension statements.

## Section 5 - Previous Civil Service Pension information

**If you left on a Civil Service Compensation Scheme 'Early Exit', did you have pre-1987 'reserved rights'?**

Yes

No

To have these reserved rights, on 1 April 1987 you were:

- employed in a job covered by the Civil Service pension arrangements
- under age 40
- in a 'mobile grade' (usually an 'Executive Officer' grade or higher).

**Are you receiving any payments from the Civil Service pension arrangements?**

Yes

No

This can be your actual pension or an annual compensation payment (ACP) that you will have received under Civil Service Compensation Scheme 'Early Exit' terms.

**Did you transfer your Civil Service pension to another provider?**

Yes

No

If you received a preserved pension, or were offered a refund of contributions, you could have transferred the benefits you built up to another pension provider.

**If yes, which pension scheme did you transfer to?**

**If this is your employer's pension scheme, please state which employer:**

## Section 6 - Former members of other public service pension schemes

If at any time from **31 March 2007** you have been a member of a public service pension scheme other than the Civil Service pension arrangements (or a by-analogy scheme) please complete the table on the following page.

Use a new line for every separate period of pension scheme membership. Please note this is to be completed for each period you were a member of a pension scheme, not just a period of employment.

### How do I find this information?

If you are not sure which of these applies to you, the statement you received when you left the scheme should have your scheme information on it, and should show what 'terms' applied to you when you left.

This information will be shown on the pension letter that confirmed the amount of pension benefits you had built up.

If after checking this letter you're still not sure, you should contact the scheme.

[www.civilservicepensionscheme.org.uk](http://www.civilservicepensionscheme.org.uk)

#### Notes for completing the table:

- 1) If you have transferred out a pension, please state which pension provider (and employer) you transferred it to.
- 2) A tapered enrolment date (or a tapered protection end date) is the date you would have moved into your previous pension provider's 'reform' scheme. This is usually linked to your age, and will normally have been after that scheme's launch date.  
  
If you say yes, please state the tapered enrolment / protection end date you were given.
- 3) Your previous provider will have told you that you were not going to join their reform scheme, usually because of your age.



	Employer and pension scheme	Your Normal Pension Age	Your member number	Membership period		Answer Yes or No. When you left the pension, did you:			Answer Yes or No. Did you get offered:	
				Start	End	receive a refund of your contributions?	receive payment of the pension?	transfer it to another pension scheme? If yes, where?	a tapered enrolment date? If yes, what was it? full protection?	full protection?
1										
2										
3										
4										

If you need more space, please continue on a separate sheet.

Notes one-three can be found on the previous page.

## Section 7 - The Declaration

<input type="checkbox"/>	<b>I have never been a member of a public service pension before.</b>
<input type="checkbox"/>	<b>I have been a member of a public service pension before and have completed all the relevant sections.</b>

I believe that the information I have provided on this form is correct.

<b>Full Name</b>
<b>Signature</b>
<b>Date</b>

When completed, please send this form to:  
[EMPLOYER TO INSERT RETURN ADDRESS]