

**Request for an estimate of pension benefits**

**LGPS 23**

To: Pensions Section	From:		
Employee			
NI number		Payroll Reference	
Date of birth		Partnership status	
Estimated date of leaving			
Remuneration ((under 2008 Scheme definition)			£
Annual Pay (under 2014 Scheme definition)			£

**Reason for the Request of an Estimate (Please tick the appropriate box(es))**

<input type="checkbox"/>	<b>Resignation Age 55+</b> (within APF estimate policy – if not a charge may be payable) Requests will only be processed for employers who are not set up on i-Connect. Employers who are on i-Connect will need to do their own estimates via the i-Connect portal. <b>Please refer the member to my pension online for an estimate</b>
<input type="checkbox"/>	<b>Ill Health</b> – Please tick the appropriate box to indicate the ill-health tier that applies. The estimate should not be prepared without a copy of the ill-health certificate except in exceptional circumstances. <input type="checkbox"/> Tier 1 <input type="checkbox"/> Tier 2 <input type="checkbox"/> Tier 3 Annual Assumed Pensionable Pay      £
<input type="checkbox"/>	<b>Redundancy</b> Requests will only be processed for employers who are not set up on i-Connect. Employers who are on i-Connect will need to do their own estimates via the i-Connect portal.
<input type="checkbox"/>	<b>Business Efficiency</b> Requests will only be processed for employers who are not set up on i-Connect. Employers who are on i-Connect will need to do their own estimates via the i-Connect.
<input type="checkbox"/>	<b>Flexible Retirement - <u>with</u></b> reduction for early retirement
<input type="checkbox"/>	<b>Flexible Retirement - with reduction <u>waived</u></b> in full (If you would like details of waiving the reduction in part please contact the Avon Pension Fund.)
<input type="checkbox"/>	<b>Employer Agrees to early release - <u>with</u></b> reduction for early retirement <input type="checkbox"/> If under age 60 – the employer has agreed for the Rule of 85 protections to apply
<input type="checkbox"/>	<b>Employer Agrees to early release - with reduction <u>waived</u></b> in full <input type="checkbox"/> If under age 60 – the employer has agreed for the Rule of 85 protections to apply (If you would like details of waiving the reduction in part please contact the Avon Pension Fund.)

Estimate details are to be sent to:	
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(in all instances except resignation the estimate will be returned to the employer)

SIGNED:		DATE:	
PLEASE PRINT NAME:		CONTACT	

**Avon Pension Fund, Local Government Pension Scheme administered by Bath & North East Somerset Council.**

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**Data Protection:** Avon Pension Fund is a Data Controller as defined in the UK GDPR. We store, hold and manage your personal data in line with statutory requirements to provide you with pension administration services. For more information about how we process your data, your individual rights and answers to frequently asked questions, please visit our website: [avonpensionfund.org.uk](http://avonpensionfund.org.uk)