Pension inquiry form

Information needed when a pension sharing order or pension attachment order may be made

Insert details of pension scheme here	
To:	
of:	
Reference No:	

A. To be completed by pension scheme member or policy holder:

1. Pension scheme member or policy holder's details:

Name	
Date of marriage	
Date of separation	
Address (including postcode)	Postcode
Reference	

2. Solicitors details:

Name	
Address (including postcode)	Postcode
Reference	
Telephone	

3. Address to which the form should be sent once completed if different from 2 above:

Address (including postcode)

Postcode

Signature

of pension scheme member or policy holder

(The scheme member's signature is necessary to authorise the release of the requested information, unless a court order requiring the information is attached to this form.)

B. To be completed by the pension arrangement

1. (a) Please confirm that you have already provided a valuation of the member's pension rights to the scheme member or to the court.

☐ Yes ☐ No

(b) If the answer to (a) is No, details of the cash equivalent value (CEV) quotation should be attached and the date on which it was calculated.

2. Provide a statement summarising the way in which the valuation referred to above has been or will be calculated.

Fund value on given date:
No of units post date of marriage * Bid price of units

3. State the pension benefits included in the valuation referred to in B1 above.

Money purchase arrangement: 25 per cent of Tax free lump sum on commencement]

4. (a) Does the person responsible for the pension arrangement offer scheme membership to the person entitled to a pension credit?

☑ Yes ☐ No

(b) If Yes, does this depend on employer and/or trustee approval?

☐ Yes ☑ No

5. If the answer to 4(a) is Yes, what benefits are available to the person with the pension credit?

Money purchase arrangement: 25 per cent of Tax free lump sum on commencement

C. To be completed by the pension arrangement

1. The full name of the pension arrangement and address to which a pension sharing order should be sent.

NEST

Nene Hall

Lynch Wood Business Park,

Postcode | P | E | 2 | | | 6 | F | Y |

Peterborough

2. As far as you are aware, are the member's rights under the pension scheme subject to any of the following:

- a pension sharing order ☐ Yes ☐ No
- a pension attachment order made under section 23 of the Matrimonial Causes Act 1973 (England and Wales), section 12A(2) or (3) of the Family Law (Scotland) Act 1985 or under Article 25 of the Matrimonial Causes (Northern Ireland) Order 1978 ☐ Yes ☐ No
- a pension attachment order made under Part 1 of Schedule 5 to the Civil Partnership Act 2004 (England and Wales), section 12A(2) or (3) of the Family Law (Scotland) Act 1985 or under Part 1 of Schedule 15 to the Civil Partnership Act 2004 (Northern Ireland) ☐ Yes ☐ No
- a forfeiture order ☐ Yes ☐ No
- a bankruptcy order ☐ Yes ☐ No

- an award of sequestration on a member's estate or the making of the appointment on his estate of a judicial factor under section 41 of the Solicitors (Scotland) Act 1980.

☐ Yes ☐ No

3. Do the member's rights include rights which are not shareable by virtue of regulation 2 of the Pension Sharing (Valuation) Regulations 2000?
If Yes, please provide details.

☐ Yes ☐ No

4. Is the scheme member a trustee of the pension scheme?

☐ Yes ☐ No

5. If a pension sharing order is made, will the person responsible for the pension arrangement require information regarding the scheme member's state of health before implementing the pension sharing order?

☐ Yes ☐ No

6. Does the person responsible for the pension sharing arrangement require any further information other than that contained in regulation 5 of the Pensions on Divorce etc. (Provision of Information Regulations) 2000, before implementing any pension sharing order?
If Yes, specify what.

☐ Yes ☐ No

D. To be completed by the pension arrangement

1. Disregarding any future service or premiums that might be paid and future inflation, what is the largest lump sum payment that the member would be entitled to take if s/he were to retire at a normal retirement age?

25 per cent of fund value on normal retirement age

2. What is the earliest date on which the member has the right to take benefits, excluding retirement on grounds of ill health?

		/			/				

* The pension sharing charges be apportioned between the parties as follows:

Not applicable

Or

* The pension sharing charges be paid in full by the transferor.

(*delete as appropriate)

3. Are spouse's or civil partner's benefits payable?

☐ Yes ☐ No

The parties certify that:

(i) they have received the information required by Regulation 4 of the Pensions on Divorce etc (Provisions of Information) Regulations 2000;

(ii) that information is attached on Form P (Pension Inquiry Form); and

(iii) it appears from that information that there is power to make an order including provision under [section 24B of the Matrimonial Causes Act 1973] [paragraph 15 of Schedule 5 to the Civil Partnership Act 2004].

4. What lump sum would be payable on death at the date of completion of this form?

Full fund value

5. What proportion of the member's pension would be payable as of right to the spouse or civil partner of the member if the member were to die:
   a) before retirement, and
   b) after retirement, disregarding any future service or premiums that might be paid and future inflation?

A. 100 per cent as per members beneficiary nomination
B. Would depend upon the option chosen by the member at the time of retirement that is Joint life or 10 year guarantee period

6. Is the pension in payment, drawdown or deferment? If Yes, which?

☐ Yes ☐ No

7. Please provide a copy of the scheme booklet.

Dated | | | | | | | | |