

LG29 ESTIMATE REQUEST FORM

RBKC 2021.V1

Return completed form securely to:

pensions@rbkc.gov.uk

Please include the word **Encrypted** in the subject heading

Pension fund	Royal Borough of Kensington and Chelsea
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Name of employer:	
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Section 1: Member's details

Surname:	First name:	Title:
NI number:	Date of birth:	Unique pay number:

Section 2: Reason for estimate request

Redundancy (age 55 or over) <input type="checkbox"/>	Resignation (age 55 or over) <input type="checkbox"/>	Flexible retirement: standard <input type="checkbox"/>
Business Efficiency (age 55 or over) <input type="checkbox"/>	Notional Transfer Out/CETV <input type="checkbox"/>	Flexible retirement: reductions waived <input type="checkbox"/>
Early payment reductions waived (compassionate grounds if joined pre 1 April 2014) <input type="checkbox"/>	Death in service <input type="checkbox"/>	Do you have a published discretions policy which allows partial flexible retirement? (Y or N) <input type="text"/>
Employer consent (employer funding early payment before 60) <input type="checkbox"/>	Ill health – specify likely Tier either: 1 or 2 or 3 <input type="text"/>	If YES: All pre 2008 benefits must be taken on flexible retirement.
	Other – please specify <input type="text"/>	Amount of Post 2008 benefits taken by member if not 100% <input type="text"/>
		Amount of Post 2014 benefits taken by member if not 100% <input type="text"/>

Section 3: Final pay (LGPS 2008 definition)

The final pensionable pay shown below is in respect of the period: From To

Period		(A) Actual annual salary	(B) % WTE hours	(C) WTE annual salary	(D) Fraction of months and days	(E) Total amount of WTE pay
From	To					
		£	%	£		£
		£	%	£		£
Subtotal (A)						£

Final pay - Additional variable payments (LGPS 2008 definition)

Please show any additional variable payments made (excluding overtime and additional hours under the LGPS 2008 definition) together with the period the payments were in respect of.

Type of additional variable payment (under LGPS 2008 regulations)	Period for which payment(s) earned	Total payment	Amount of payment relevant to final pay period
		£	£
		£	£
Subtotal (B)			£

Please now complete page 2.

Total of A and B

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Section 4: Pensionable pay for LGPS 2014 scheme

Provide details of the applicable Section (Main or 50/50) from 1 April 2020 to the estimated last day of membership.

Table A – complete in all cases - Year ending 31 March 2021

Pensionable pay in Main Section	£	Pensionable pay in the 50/50 section	£
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Table B – Complete where the estimated last day of membership is before 1 April 2022 Period from 1 April 2021 to estimated leaving date

Pensionable pay in Main Section	£	Pensionable pay in the 50/50 section	£
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Table C – Complete where the estimated last day of membership is after 31 March 2021.

Annual pensionable pay to project forwards from 1 April 2021 to 31 March 2022 and from 1 April 2022 to the estimated last day of membership

Annual Pensionable pay in Main Section	£	Annual Pensionable pay in the 50/50 section	£
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Ill health retirement

If the estimate request is in respect of a possible Tier 1 or Tier 2 ill health retirement case or a death in service, you will need to provide the Assumed Pensionable Pay (APP) figure at the last day of membership.

What is the APP figure? (This should be the annual rate)	£
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Section 5: Declaration by employer completing form

I understand that the information given on this form will be used to calculate an estimate of pension benefits and any errors or omissions will result in an incorrect estimate of member's benefits as well as any associated employer costs.

I understand that, in the event of an actual retirement, the *Final Pay* figure (LGPS 2008 definition) will need to be the highest year in the last 3 years ending on the anniversary of the date of leaving. I further certify that I am aware of the requirement to provide additional salary figures if there has been a drop in pay in the 10 years prior to the date of leaving.

Print name:	Phone number:
Email address:	Date:

Notes: Please refer to the *Guidance notes for employers* when completing this form.

Section 3 – Pensionable pay for LGPS 2014 scheme: the pensionable pay figure should include Assumed Pensionable Pay (APP) for any periods that the member's pay has been/will be reduced due to sickness or during a period of ordinary maternity or adoption leave, paid additional maternity or adoption leave or paid shared maternity leave.

Assumed Pensionable Pay (APP) – You will need to calculate the annual APP figure when you are requesting figures for a possible Tier 1 or 2 Ill health retirement, or Death in service.

Please refer to the HR and Payroll Guides produced by the Local Government Association for more information on pensionable pay and APP: www.lgpsregs.org/employer-resources/index.php