

Local Government Pension Scheme (LGPS)

Surrey Pension Fund

Nomination of cohabiting partner pension form

(2015 V1)

DO NOT COMPLETE THIS FORM IF YOU ARE MARRIED OR IN A CIVIL PARTNERSHIP. YOUR SPOUSE OR CIVIL PARTNER WOULD AUTOMATICALLY RECEIVE A SURVIVOR'S BENEFIT IN THE EVENT OF YOUR DEATH.

Benefits payable on the death of a member of the Local Government Pension Scheme (LGPS) include pensions for children, a surviving spouse or registered civil partner¹ and, provided you are a member of the LGPS on or after 1 April 2008, a nominated cohabiting partner.

You can nominate a cohabiting partner, of either the opposite or the same sex by completing the nomination form and returning it to the address shown overleaf.

However, to be able to make a nomination, all of the following conditions must have applied to both you and your nominated cohabiting partner for a continuous period of at least 2 years on the date you both sign the form:

- both you and your nominated cohabiting partner are, and have been, free to marry each other or enter into a civil partnership with each other **and**,
- you and your nominated cohabiting partner have been living together as if you were husband and wife or civil partners, **and**
- neither you nor your nominated cohabiting partner have been living with someone else as if you/they were husband and wife or civil partners, **and**
- either your nominated cohabiting partner is financially dependent on you or you are financially interdependent on each other.

A nomination is not valid if all of the above conditions have not been met for a continuous period of at least 2 years on the date you sign the form.

Your partner is normally financially dependent on you if you have the highest income. Financially interdependent means that you rely on your joint finances to support your standard of living. It doesn't mean that you need to be contributing equally. For example, if your partner's income is a lot more than yours, he or she may pay the mortgage and most of the bills, and you may pay for the other household expenses such as shopping and clothing.

On your death, a survivor's pension would be paid to your nominated cohabiting partner if:

- the nomination has effect² at the time of death, **and**
- your nominated cohabiting partner satisfies us that the above conditions had been met for a continuous period of at least 2 years immediately prior to your death.

You and your nominated cohabiting partner should be aware that on your death we will have to verify that the conditions for nomination have been satisfied. For example, we may do this by asking for confirmation that you lived in a shared household with shared household spending, or that you had a bank account or mortgage in joint names. There would be a right of appeal if we decide not to pay a pension and your partner believes that he/she is entitled.

Please note that you are not required to make a nomination for a NCP, but making a nomination would help us to establish eligibility for the payment of a partner's pension in the event of your death. Also, please remember to let us know of a change in your circumstances which could affect the nomination, or if you wish to cancel it.

¹ A civil partnership is a relationship between two people of the same sex ("civil partners") which is formed when they legally register as civil partners of each other.

² A nomination ceases to have effect if-

- (a) either you or your nominated partner gives us written notice to cancel the nomination, or
- (b) you make a subsequent valid nomination in favour of a new co-habiting partner, or
- (c) either you or your nominated partner marries, forms a civil partnership or lives with a third person as if they were husband and wife or as if they were civil partners, or
- (d) your nominated partner dies before you.

Nomination of cohabiting partner pension form

PLEASE READ THE NOTES OVERLEAF CAREFULLY BEFORE COMPLETING THIS FORM

YOUR DETAILS

Surname										
Forename(s)										
NI Number										
Employer										
Date of birth	DD	MM	YY							
Home address										

YOUR NOMINATED PARTNER'S DETAILS

Surname										
Forename(s)										
NI Number										
Date of birth	DD	MM	YY							
Home address										

YOUR DECLARATION

I nominate my partner to receive a survivor's pension under the Local Government Pension Scheme.

Signed					Date	DD	MM	YY
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JOINT DECLARATION

We confirm that for a continuous period of at least 2 years prior to the date of this declaration each of the following has been applicable:

- we have been free to marry each other or enter into a civil partnership with each other **and**
- we have lived together as if we were husband and wife or registered civil partners **and**
- neither of us have been living with someone else as if we were husband and wife or civil partners **and**
- our financial affairs have been dependent or interdependent on each other.

Your signature					Date	DD	MM	YY
Partner's signature					Date	DD	MM	YY

Please note that on your death, we will need to be satisfied that your relationship met the qualifying conditions for the payment of a cohabiting partner's pension.

Please send completed form to: **Pension Services, Surrey County Council, Room 243, County Hall, Kingston upon Thames, Surrey KT1 2DN**