

Employer's Request for an Estimate of Retirement Benefits

Please email this completed form to info@nilgosc.org.uk.

Section 1 – Member details

Employer

Staff number/Post ID

Member surname

Member first name(s)

Address

| | | |
|----------------------|----------|----------------------|
| <input type="text"/> | | |
| <input type="text"/> | | |
| <input type="text"/> | Postcode | <input type="text"/> |

Occupation

NILGOSC reference number

Potential date of leaving



Section 2 – Pensionable pay

CARE pay – to be completed for all members with post-1 April 2015 membership

Estimated pensionable pay in the current financial year to date of leaving

| Date from | Date to | Main section pensionable pay (£) | 50/50 section pensionable pay (£) |
|----------------|---------|----------------------------------|-----------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| Total £ | | | |

Estimated protected final pensionable pay (LGPS (NI) 2009 definition) for 12 months prior to proposed date of leaving

Date from Date to Amount: £

If part-time, please state estimated part-time earnings for final year £

Current part-time hours per week

Contracted weeks per year

Date current contractual hours and weeks commenced



Section 3 – Reason for retirement

Voluntary retirement – Age 55* to two days before age 75

Is the 85 Year Rule to be applied for early retirements between age 55* and 60 in accordance with the employer's policy discretion?

Yes No

Is a reduction to benefits to be waived in accordance with the Employer's policy discretion? (Please complete form LGS13 if applying this discretion at retirement)

Yes No

Redundancy/efficiency of the service

Permanent ill-health

The member must have been referred to the NILGOSC's doctor for ill-health assessment well in advance of the date of leaving. A quotation can only be provided once NILGOSC has confirmed that the member meets the criteria for ill-health retirement.

Flexible retirement

Flexible retirement can only be permitted with employer consent in line with the employer's policy statement on discretions required under the LGPS (Northern Ireland) 2014 Regulations. NILGOSC will require a copy of this statement prior to the payment of pension benefits on the grounds of flexible retirement.

Is a reduction to benefits to be waived in accordance with the employer's policy discretion? (Please complete form LGS13 if applying this discretion at retirement)

Yes No

**The national minimum pension age, the earliest age someone can access their pension benefits, will be increased from age 55 to age 57 from 6 April 2028.*



Section 4 – Award to increase benefits (at a cost to employer)

Additional Pension – Regulation 32

An employing authority may resolve to award a member additional pension payable from the same date as his pension becomes payable.

Amount of additional pension to be awarded (maximum permitted is £8,823 - 2025/26 rates).

NB: If pension benefits are being paid early, except on redundancy/efficiency grounds, there will be a reduction to the amount of additional pension payable.

All employer's costs will be provided with the quotation. Quotation requests for a number of employees should be made in list form (preferably spreadsheet) ensuring that any discretions, enhancements etc. are stated.

Completed By

Print name (Authorised Officer)

Signature*

Telephone number/Extension number

Date

Email address

** By typing your name you are signing this form electronically. You agree that your electronic signature is the legal equivalent of your manual signature. You are also confirming that the information you have provided is accurate and complete, to the best of your knowledge and belief.*