

Your Address


Scheme Address


Date:

Dear

**Transfer of pension benefits  
Member or policy Number:**

**National Insurance Number:**

I wish to consider transferring my pension benefits with yourselves to the TfL Pension Fund. I attach the TfL Transfer Information Sheet which contains details about the scheme as well as the details they require to provide me with a transfer illustration.

**Please note that TfL are unable to provide me with a transfer illustration until they have all of the information requested, so please do not send any details to me until you have collated all of the information requested.**

Please provide all forms that you require completion of by both me and TfL when providing the transfer value details.

Yours

# Transfer Information Sheet

## Member details

Member name	
Member number	
National Insurance number	
Date of birth	
Gender	
Date joined TfL Pension Fund	

## Receiving scheme

Scheme name	TfL Pension Fund
HMRC approval	Chapter 2 of Part 4 of the Finance Act 2004
PSTR reference number	00329024RY
Scheme type	Defined benefit
Contracted out	Yes
ECON: E3002617X	SCON: S4008081W
GMP revaluation method	Section 148 Orders
Member of Public Sector Transfer Club	No

## Transfer Information Sheet

### Member details

Member name

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Member number

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National Insurance number

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### Transferring scheme details (part 1)

Scheme name

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HMRC approval

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PSTR reference number

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Scheme type

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Contracted out Yes / No (if yes complete part 2 of this form)

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Date of membership From: / / To: / /

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Total Transfer Value (excluding AVCs) £

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Post 1997 Transfer Value (excluding AVCs) £

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AVC transfer value £

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Transfer Value Guarantee Date / /

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#### Important notes:

TfLPF cannot accept a transfer of benefits if the member is currently contributing to the above arrangement. Has the member ceased contributing to the above arrangement?

**Yes / No\***

The TfL Pension Fund does not accept transfers consisting wholly or partly of Pension Credit Rights following a Pension Sharing Order on divorce and is only willing to accept 100 per cent of the transfer value available (TfLPF does not accept partial transfers). Is this a partial transfer? **Yes / No\*** If "yes" please provide full details

Is the member affected by an Earmarking Order? **Yes / No\***. If "yes" please provide full details

\*Please delete as appropriate.

**Do not provide any details until all requested information including the NI history or COD calculation is available.**

## Transfer Information Sheet

### Member details

Member name \_\_\_\_\_

Member number \_\_\_\_\_

National Insurance number \_\_\_\_\_

### GMP / Protected Rights details (part 2)

Period of contracted out employment From: / / To: / /

ECON: \_\_\_\_\_

SCON / ACON: \_\_\_\_\_

Weekly Pre 88 GMP At date of leaving £ \_\_\_\_\_

Weekly Post 88 GMP At date of leaving £ \_\_\_\_\_

Weekly Total GMP At date of leaving £ \_\_\_\_\_

Has GMP been reconciled with HMRC? Yes / No \_\_\_\_\_

Contracted out National Insurance History (for years to 05/04/1987 provide Upper Tier Contributions, for years from 06/04/1987 to 05/04/1997 provide Contracted Out Earnings).

Tax Year Ending	Upper Tier Contributions (UTCs)	Tax Year Ending	Contracted Out Earnings (COEs)
05/04/1979	£	05/04/1988	£
05/04/1980	£	05/04/1989	£
05/04/1981	£	05/04/1990	£
05/04/1982	£	05/04/1991	£
05/04/1983	£	05/04/1992	£
05/04/1984	£	05/04/1993	£
05/04/1985	£	05/04/1994	£
05/04/1986	£	05/04/1995	£
05/04/1987	£	05/04/1996	£
		05/04/1997	£

Where the member has been contracted out on a money purchase basis you should obtain a COD calculation from HMRC as at the date of leaving and submit that to us with the transfer value details.

**Please note that we are unable to accept any GMP or pre 97 protected rights without the full NI history or a COD calculation.**