

Avon Pension Fund

Bath & North East Somerset Council

Lewis House, Manvers Street

Bath, BA1 1JG

E: avonpensionfund@bathnes.gov.uk

W: avonpensionfund.org.uk

T: 01225 395100

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| **Information Required for a Transferee Admission Agreement** | **LGPS 34B (Part 1)** |

***To be completed by the prospective Transferee Admission Body***

Full Legal Name of the Organisation:

Legal Status of the Organisation (please tick relevant box below)

Company [ ]  Trust [ ]

Charity Incorporated Company (C.I.C.) [ ]  Charity Incorporated Organisation (C.I.O.) [ ]

Unincorporated Association [ ]  Other (Please specify below) [ ]

Registered Address of the Organisation:

Company Registration Number:

Is the Organisation a Registered Charity? YES [ ]  NO [ ]

If YES, please provide the Registration Number:

Does the Organisation have a Seal? YES [ ]  NO [ ]

Is the Admission Agreement open or closed to new employees? OPEN [ ]  CLOSED [ ]

Designation of Non-Active Transferees (Immediate or Deferred)?

*Transferring staff who are not in the LGPS at point of transfer can be treated in one of two ways. They can either be enrolled into the LGPS by the contractor* ***immediately*** *(they would then have to opt out if that was their wish) or be left out of the LGPS at point of transfer* ***(deferred)*** *and then periodically be given the option of joining the LGPS by the contractor as part of the contractor’s ongoing auto-enrolment process. Please check commercial contract.*

Is Past Service fully or partially funded? \* Fully [ ]  Partially [ ]

Effective Commencement Date of the Admission Agreement:

When does the Commercial Contract end?:

**As this information will be included in the admission agreement it is important that it is correct. In signing the admission agreement, it will be confirmed as correct.**

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| **New Employer HR, Payroll and Finance Contact Details** | **LGPS 34B (Part 2)** |

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| **HR Contact Details:**Name: Position: Telephone Number: Email Address: Name & Address of Organisation (if service provided externally):   **Payroll Contact Details (for contribution payments):**Name: Position: Telephone Number: Email Address: Name & Address of Organisation (if service provided externally):   **Finance Director Contact Details (for actuarial matters e.g. valuations):**Name: Position: Telephone Number: Email Address: Name & Address of Organisation (if service provided externally):    |

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| **Authorisation** |
| *I hereby appoint the above authorised contacts for the LGPS\*. This authorisation is required for purposes including data protection.*Name: Job Title: Email Address: ***\*****this section must be signed by an officer of the Scheme Employer of Director or equivalent level.* |
| Signed: |  | Date: |  |

**Avon Pension Fund, Local Government Pension Scheme administered by Bath & North East Somerset Council.**

**Data Protection:** Avon Pension Fund is a Data Controller as defined in the UK GDPR. We store, hold and manage your personal data in line with statutory requirements to provide you with pension administration services. For more information about how we process your data, your individual rights and answers to frequently asked questions, please visit our website: [avonpensionfund.org.uk](https://www.avonpensionfund.org.uk/)