

Annual Benefit Statement for the LGPS in England and Wales - Template (version 1.1)

Section 1: Personal Details [note 1]

Member Full Name and Title:	Address Lines 1 – 5 Postal Code	Date of Birth:	NI Number:
Partnership Status: <small>[note 2]</small>		Payroll Number:	Member Reference Number:
Employer @ 31 March 20XX: <small>[note 3]</small>		Date joined Scheme in Employment:	Section of Scheme at 31 March 20XX:

PLEASE NOTE: The benefits calculated in this statement are based on the pay figures provided by your employer below. It is important that you check these for accuracy and contact your employer should there be any inaccuracies. [notes 4 + 5 + 9 + 11]

Pensionable Pay for year ending 31 March 20XX (used to calculate Career Average Pension built up in 20XX/XX, as shown in Section 3) : £
[note 4]

Final Salary Pay for year ending 31 March 20XX (used to calculate Final Salary Pension benefits accrued to 31 March 2014 , if any, as shown in Section 4): £ [note 5]

Section 2: Summary of Total Benefits at 31 March 20XX

Your benefits accrued at 31 March 20XX (as detailed in sections 3 and 4)		Benefits payable on your death in service (at 31 March 20XX)	
Annual Pension @ 31 March 20XX: £	Automatic Tax Free Lump-sum: £	Death in Service Lump-sum: £ <small>[note 6]</small>	Annual Survivor Pension: £ <small>[note 7]</small>

Expression of Wish Details: [note 8]

KEEP IT SAFE! Remember – this statement contains personal information

Section 3: Career Average Pension Benefits as at 31 March 20XX (payable from DD/MM/YYYY) [note 10]

Pensionable Pay for year ending 31 March 20XX in Main Section: £
[notes 4 + 9]

Pensionable Pay for year ending 31 March 20XX in 50/50 section: £
[notes 4 + 9 + 11]

PLEASE NOTE: The benefits calculated in this section of the statement are based on the pay figures opposite. It is important that you check this and the pension build-up on the line below and contact your employer by [DATE] to report any perceived inaccuracies.

Amount of pension built up in year 20XX/XX

20XX/XX: Main Section

20XX/XX: 50/50 Section

Additional Pension bought

Transfers in

Total

Pay / 49 = £

Pay / 98 = £

£ [note 12]

£ [note 13]

Total = £ [note 14 a-e]

Total Career Average Pension to 31 March 20XX:

Closing balance at 31 March 20XX

+

Increase for the cost of living
(added 1 April 20XX)
£[note 15]

+

In Year build up (as shown
above)
£

=

Total Career Average Pension at
31 March 20XX
£

Section 4: Value of Final Salary Pension Benefits as at 31 March 20XX (payable from DD/MM/YYYY) [note 10a]

Final Salary Pay:
£ [notes 5 + 16]

Annual pension (for pre 1 April 2014 membership): £
[note 17]
Including: 60ths = £ + 80ths = £

Automatic Lump Sum: £[note 18]

Section 5: Projections if you remain contributing to the Scheme until DD/MM/YYYY i.e. to your Normal Pension Age (NPA) [note 19]

Normal Pension
Age:
[note 20]

Pension @ NPA: £
(Including projected Career Average Pension to NPA = £ [note 19]
and Projected Final Salary Pension to NPA [note 21]= £ (Actuarial Increase separate [note 22]))

Automatic Tax-Free Lump-
Sum @ NPA:
£ [notes 18 + 22]

Prospective survivor's annual pension if you remain in the Scheme to NPA: £ (Including £XX from the Career Average Scheme and £XX from the Final Salary Scheme) [note 23]

Section 6: Service History Details [note 24]

Breakdown of the member's service history details in this employment

