

Request for Cash Equivalent Transfer Value (CETV)

Personal Details (Please complete in BLOCK CAPITALS)

Surname: Forenames: Title: NI Number: Date of Birth: Home Address: Postcode:

Marital Status (Please tick appropriate box)

Single Married Civil Partnership Cohabiting Divorced Widowed

Reason for requesting a Cash Equivalent Transfer Value (CETV)

(Please Tick Appropriate Box)

CETV for use in Divorce Proceedings

CETV and Estimate of benefits (for an Independent Financial Advisor)

Please Note:

A CETV in respect of Divorce Proceedings will include all the relevant information required by the Court, including a schedule of charges for work carried out in relation to divorce and pension sharing. You are entitled to one free CETV each year.

A CETV for an Independent Financial Advisor will include an estimate of benefits from the Local Government Pension Scheme (LGPS). Please note you are not permitted to transfer your LGPS benefits whilst you are still contributing to the scheme. You are entitled to one free CETV each year.

We aim to provide you with the information requested above within 2 weeks of receipt of your request. In certain cases we may need to contact HM Revenue and Customs (HMRC) in respect of any Guaranteed Minimum Pension (GMP) element of your pension and this may lead to a delay in providing the information requested. In cases where GMP is requested we will notify you and ask that you allow up to 8 weeks to receive your information.

I confirm that I have read the above notes and ask that a CETV is sent to the address above.

Signed: Date:

Member Enquiry Contact: (01244) 976000

Please return to: Cheshire Pension Fund, The Portal, Wellington Rd, Ellesmere Port,
Cheshire, CH65 0BA