

# Nomination of cohabiting partner for survivor's pension

First read the accompanying notes. If you wish to proceed, use BLOCK CAPITALS to give details about yourself and your partner as requested below.

**IMPORTANT: THIS FORM IS NOT A WILL. Although the Scheme administrators would want to comply with your wishes, they have absolute discretion in deciding where, or to whom, any payment is to be directed.**

## YOUR DETAILS

Surname:

Date of birth:

First name(s):

N.I. no:

Title:

Pension reference number (if known):

Address:

Telephone numbers

(Home):

(Work):

(Mobile):

Post code:

Employer:

Employee payroll no.:

## NOMINATED PARTNER'S DETAILS

I nominate my partner named below to receive a nominated partner's pension under the LGPS:

Surname:

Date of birth:

First name(s):

N.I. no:

Title:

Address:

Telephone numbers

(Home):

(Work):

(Mobile):

Post code:

You and your nominated partner should also complete the declaration below.

## DECLARATION

**We confirm that for a continuous period of at least two years prior to the date of this declaration, all of the following have applied:**

- we have been free to marry each other or enter into a civil partnership with each other, and
- we have lived together as if we were husband and wife or registered civil partners<sup>1</sup>, and
- neither of us have been living with someone else as if we were husband and wife or civil partners, and;
- our financial affairs have been interdependent (or the nominated partner has been financially dependent upon the Scheme member).

Scheme member's signature:

Nominated partner's signature:

Date:   /   /

Date:   /   /

<sup>1</sup> For these purposes, two people of the same sex are to be regarded as living together as if they were civil partners if they would be regarded as living together as husband and wife if they were not of the same sex.

**Please note: on your death, we will need to be satisfied that your relationship met the qualifying conditions for the payment of a cohabiting partner's pension.**

Please return completed to: **West Midlands Pension Fund, PO Box 3948, Wolverhampton WV1 1XP**

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### Explanatory notes

Benefits payable on the death of a member of the Local Government Pension Scheme (LGPS) include pensions for children, for a surviving spouse or registered civil partner<sup>1</sup> and, provided the Scheme member paid into the LGPS on or after 1 April 2008, for a nominated cohabiting partner.

You can nominate a cohabiting partner, of either opposite or same sex, by completing the nomination form and returning it to the address shown on the form.

**However, to be able to make a nomination, all of the following conditions must have applied to both you and your nominated cohabiting partner for a continuous period of at least two years on the date you both sign the nomination form:**

- both you and your nominated cohabiting partner are, and have been, free to marry each other or enter into a civil partnership with each other, and
- you and your nominated cohabiting partner have been living together as if you were husband and wife, or civil partners, and
- neither you or your nominated cohabiting partner have been living with someone else as if you/they were husband and wife or civil partners, and
- either your nominated cohabiting partner is financially dependent on you or you are financially interdependent on each other.

A nomination is not valid if all of the above conditions have not been met for a continuous period of at least two years on the date you sign the form.

Your partner is financially dependent on you if you have the highest income. Financially interdependent means that you rely on your joint finances to support your standard of living. It doesn't mean that you need to be contributing equally. For example, if your partner's income is a lot more than yours, he or she may pay the mortgage and most of the bills, and you may pay for the weekly shopping.

On your death, a survivor's pension would be paid to your nominated cohabiting partner if:

- the nomination has effect<sup>2</sup> at the date of your death, and
- your nominated cohabiting partner satisfies us that the above conditions had also been met for a continuous period of at least two years immediately prior to your death.

You and your nominated cohabiting partner should be aware that on your death we will have to verify that the conditions for paying a survivor's pension have been satisfied. We may do this by, for example, asking for confirmation that you lived in a shared household with shared household spending, or your partner may be asked to demonstrate that you had a bank account or mortgage in joint names. There would be a right of appeal if we decide not to pay a pension and your partner believes that he/she has entitlement.

Completing and returning a form is important as we cannot pay a pension to a cohabiting partner if we do not have a valid nomination form.

**You do not need to complete this form if you are married or are in a registered civil partnership (same sex partnership).**

**Remember to let us know of a change in your circumstances which could affect the nomination, or if you wish to cancel it.**

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<sup>1</sup>A civil partnership is a relationship between two people of the same sex ('civil partners') which is formed when they legally register as civil partners of each other.

<sup>2</sup>A nomination ceases to have effect if:

- (a) either you or your nominated partner gives us written notice to cancel the nomination, or
- (b) you make a subsequent valid nomination in favour of a new cohabiting partner, or
- (c) either you or your nominated partner marries, forms a civil partnership or lives with a third person as if they were husband and wife or as if they were civil partners, or
- (d) your nominated partner dies before you.