



FAST-TRACK CHECKLIST

In many cases, a recent **CETV** will contain all of the information that we require. In most of the remaining cases, a recent **benefit statement** will be sufficient in addition to the CETV. If you are in any doubt please get in touch with us and we will help.

If you prefer to check yourself, below is a list of the information we require to complete a report, and some scheme specific requirements are given at the bottom.

Public Sector Pensions

Member is still serving

Pensionable salary

Date pension contributions started

Confirmation that the member is still serving

If the member has worked part time, then full time equivalent service¹ is needed

CETV value

Member is not serving but has not retired

Deferred pension benefit amount

Date pension contributions started

Date pension contributions stopped

CETV value

Member is retired

Annual pension amount

Date pension contributions started

Date pension contributions stopped

Retirement date

CETV value

Some Scheme specific additional questions

Armed Forces Pension Scheme

Are they a member of the 1975 or 2005 scheme

What rank is the member

Police Pension Scheme NHS

Are they a member of the 1987 or 2006 scheme

Please notify us if they are a GP or a dentist

Civil Service

Are they a member of the Classic, Premium, Nuvos or Partnership

1. Pension schemes often allow for part time work by adjusting the overall service amount. For example, 10 years of 50% part time work would be expressed as 5 years full time equivalent

