Occupational Pension Schemes (Channel Islands)

Employee is retiring

AVIVA

Please complete this form as this employee is due to retire

1 Personal details

Pension scheme name

Scheme number

Employee's surname *Mr/Mrs/Miss/Ms/title*

Employee's forename(s)

Employee's member number

Is member married/in a civil partnership? yes ☐ no ☐

Is the employee covered by any other Aviva Pension Policy connected with this employment? yes ☐ no ☐

Please list policy numbers

Employee's normal retirement date *day* *month* *year*

2 Further information

Please answer only the following questions marked (✔).

☐ What is the employee's final pensionable salary? £

☐ What is the employee's pensionable salary at *day* *month* *year* £

☐ What is the employee's final remuneration? £
See explanatory details – Note 1

☐ When did the employee start work in your employment? *day* *month* *year*

☐ If applicable, please obtain and forward the employee's additional voluntary contribution policy enclosed ☐ to follow ☐

3 Benefits limits

For this employment only, has the member changed from part-time to full-time employment or vice versa?
See explanatory details – Note 2

yes ☐ no ☐ If 'yes' please provide below details of relevant dates

4 Details of spouse/civil partner – *if widow's/widower's/surviving civil partner's benefits are not provided, please ignore this section*

Spouse's/civil partner's surname

Forename(s)

Spouse's/civil partner's date of birth *day* *month* *year*

Have you seen the spouse's/civil partner's birth certificate?
See explanatory details – Note 3

yes ☐ no ☐

Have you seen the marriage/civil partner certificate?
For widow's/widower's/surviving civil partner's benefit only

yes ☐ no ☐

If neither of these certificates can be produced for you to verify the spouse's/civil partner's date of birth, please enclose any relevant documentation as this may suffice.

Please list any documents enclosed

It is important that these details are provided as quickly as possible so that benefits can be set up accurately.

5 Authorised signature

Authorised and signed on behalf of the Employer/Trustees

Signature

Print name

Date

Position

When you have answered all the questions and signed the form, please return it to Aviva.
A copy of this completed form will be available on request.

Explanatory details

Employee is retiring
This form will be sent to you two or three months before the employee is due to retire. You need only answer those questions which have been marked for your specific attention.

On receipt of the form, we will assess the benefits due and the relevant quotations will be issued.

Send the form together with the 'Retirement benefits elsewhere' form to Aviva.

Please ensure that you fill in all the relevant boxes on the form and tick either 'yes' or 'no' boxes whenever they occur; make sure too, that the form has been signed. This will help us to deal with your enquiry as quickly as possible.

1. Employee's final remuneration
This will be calculated as shown in the scheme rules.

2. Part-time employment
Employment is regarded as part-time where less than 30 hours per week are worked.

3. Birth certificate
If for some reason this cannot be produced, we can accept other documents in lieu eg. a Passport or Certificate of Naturalisation.

Remember if you have any problems please contact us.

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