

## Application for Admission to Warwickshire LGPS Pension Fund

<p><b>Details of Applicant Body</b></p> <p>Name of Academy/Contractor</p> <p>Address</p> <p><b>Details of person co-ordinating the application</b></p> <p>Name</p> <p>Telephone Number</p> <p>Email Address</p>	
<p><b>Type of admission body</b>  <i>(See guidance notes below and the Pension Fund's Admissions and Termination Policy for information on types of admission bodies)</i></p>	<p><input type="checkbox"/> <b>A</b> Community Body</p> <p><input type="checkbox"/> <b>B</b> Transferee Body</p> <p><input type="checkbox"/> <b>C</b> Scheduled Body</p>

### Section 1 - General Information

<p><b>A Community Bodies</b>  <i>(Answer this section if you ticked box A above)</i></p>	
<p>Explain why you consider that the Applicant Body meets the requirements of a Community Body as set out in the regulations and the Pension Fund's Admissions and Termination Policy</p>	
<p>No. of potential scheme members</p>	

Will you receive direct funding from a scheme employer? If so, which one and on what basis i.e. how much, how long is it guaranteed for, etc.	
Will a scheme employer guarantee any liabilities arising out of your admission?	

**B Transferee Bodies**

*(Answer this section if you ticked box B above)*

Will you be performing a contract or function on behalf of a scheme employer? If so, which one and on what basis. How long is the contract, etc.	
Do you already have any contracts with other scheme employers in the Pension Fund? If so, which ones	
Please confirm that the scheme employer will be a party to the admission agreement	
Please confirm the scheme employer will guarantee any unfunded liabilities arising out of your admission and that you have a Pass Through Arrangement	
<p><b>Details of people transferring to you/ members for admission</b></p> <p>This can be who you believe will be transferring to you.</p>	<p>Please Include:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• National Insurance number</li> <li>• Date of Birth</li> <li>• Weekly hours to be worked on the contract.</li> </ul>

**C Scheduled Bodies**

*(Answer this section if you ticked box C above)*

Please identify which type of scheduled body you are with reference to the Pension Fund's Admissions and Termination Policy

No. of potential scheme members

Please confirm that you have internal authority to become an admission body within the Warwickshire LGPS Pension Fund

Are you joining a Multi Academy Trust? If so which one

**Details of people transferring to you/ members for admission**

This information should be supplied on an excel spreadsheet please from your payroll provider up to date of transfer. For Academies that use the county payroll please contact your usual payroll advisor for this information.

Please Include:

- Name
- National Insurance number
- Date of Birth
- Current weekly hours worked
- Full time equivalent annual pay (pay received if the member worked full time over the number of paid weeks)
- Actual Annual Salary
- Actual pensionable pay up to date of transfer (care pay)
- Full member of the scheme or 50/50?

## Section 2 – Contact Details

**A Community Bodies and B Transferee Bodies**

(Answer this section if you ticked box A or B above)

Name of the Body to be admitted / providing the contract	
Scheme Employer / Ceding employer / Previous Employer	
Date contract to commence / or date to join Fund	
Length of contract / admission period	
Admission agreement: Open or Closed to new entrants?	
If not joining the Local Government Pension Scheme name of Broadly Comparable Scheme	
Number of Scheme members transferring or for admission	
<p><b>Payroll contact for ceding / previous employer</b></p> <p>Name</p> <p>Email</p> <p>Telephone number</p>	
<p><b>Legal contact for ceding / previous employer</b></p> <p>Name</p> <p>Email</p> <p>Telephone number</p>	
<p><b>Payroll contact for admission body</b></p> <p>Name</p> <p>Email</p> <p>Telephone number</p>	

<p><b>Legal contact for Admission Body</b></p> <p>Name</p> <p>Email</p> <p>Telephone number</p>	
<p><b>CFO of Admission Body</b></p> <p>Name</p> <p>Email</p> <p>Telephone number</p>	

<p><b>C Scheduled Bodies</b></p> <p>(Answer this section if you ticked box C above)</p>	
<p><b>Details of the Academy</b></p> <p>Name</p> <p>Postal Address</p>	
<p><b>Details of Payroll Provider</b></p> <p>Name</p> <p>Postal Address</p> <p>Name of contact at the Payroll provider and their telephone number/email address</p>	
<p><b>Contact details for the person responsible for the Monthly Contribution Report</b></p> <p>Name</p> <p>Telephone number</p> <p>Email Address</p>	

**Contact details for the person responsible for notifying us of changes to members records ie starters/changes of hours etc/terminations**

Name

Telephone number

Email Address

**Contact details for the person responsible for Policy/Discretion decisions/Financial reporting etc.**

Name

Telephone number

Email Address

**Contact Details of person responsible for ISA19/FRS102**

Name

Telephone number

Email Address

**Contact details during school holidays**

Name

Telephone number

Email Address

**Further Information** *(If there is any further information you would like to provide in relation to your application e.g. requests for risk-sharing, pooling, etc. please include it here)*

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<b>Date admission required by</b>	
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**By signing below you confirm that you have authority on behalf of the applicant body to undertake to comply with the relevant LGPS regulations and agree that in the event that the applicant body is admitted, its participation in the Pension Fund will be governed by the terms of the standard form admission agreement as appended to the Pension Fund's Admissions and Termination Policy (Please note Scheduled Bodies will not normally be asked to enter into an admission agreement)**

Name	
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Position	
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Signature	
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Date	
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## Guidance Notes for Application to Warwickshire LGPS Pension Fund

In order to be admitted to the Warwickshire LGPS Pension Fund, the applicant body must fulfil the requirements of the relevant LGPS regulations.

The LGPS regulations set out certain bodies that are entitled to be members of the LGPS by virtue of the type of organisation that they are. The Warwickshire LGPS Pension Fund classes these as “Scheduled Bodies”. The Admissions and Terminations Policy sets out at Annex A what those bodies are, however, you should consult the relevant regulations for any updates.

In addition to Scheduled Bodies, the LGPS regulations set out other types of bodies that can be admitted to the LGPS if they meet certain criteria. The most common types of those admission bodies are:

- Community Bodies –
  - *a body which provides a public service in the United Kingdom which operates otherwise than for the purposes of gain and has sufficient links with a Scheme employer for the body and the Scheme employer to be regarded as having a community of interest (whether because the operations of the body are dependent on the operations of the Scheme employer or otherwise);*
  - *a body, to the funds of which a Scheme employer contributes;*
  - *a body representative of any Scheme employers, or local authorities or officers of local authorities;*
  - *a body which provides a public service in the United Kingdom and is approved in writing by the Secretary of State for the purpose of admission to the Scheme.*
  
- Transferee Bodies –
  - *a body that is providing or will provide a service or assets in connection with the exercise of a function of a Scheme employer as a result of the transfer of the service or assets by means of a contract or other arrangement*

For further information on the types of admission bodies and how that affects admission to the Warwickshire LGPS Pension Fund, please refer to the Admissions and Termination Policy.

You will need to provide further information under either section A, B or C, depending on which type of admission body you are.

An authorised representative must sign the declaration to confirm that the applicant body is undertaking to comply with the relevant LGPS regulations if it is admitted. In the event that the applicant body’s application is accepted, this will be regarded as acceptance to the standard terms in the template form admission agreement as appended to the Admissions and Termination Policy.



## **Contact details for the Warwickshire Pension Fund**

If you have any questions on the application process, please contact the Pension Fund where we will endeavour to help with any queries you may have.

Dawn Clutton  
01926 414995  
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