

# Valuation Request for Matrimonial Proceedings

Please complete the details requested in **BLACK** ink and **BLOCK CAPITALS**.  
Sign, date and return the form to the address given below.

Your full name	<input type="text"/>	
Your date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	
The address to which you wish your correspondence to be sent (i.e. your home address)	<input type="text"/>	
Your national insurance number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Your membership number	<input type="text"/>	
Do you currently contribute to the Local Government Pension Scheme (LGPS)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<i>or</i>		
Do you have a deferred pension in the LGPS?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<i>or</i>		
Are you in receipt of a pension from the LGPS?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If you have more than one record with the Fund, do you require a valuation for each record? If no, please provide the membership numbers you would like a valuation for	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Membership number	<input type="text"/>	
The name of the employer in whose employment you are (or were) a member of the LGPS	<input type="text"/>	
Have divorce or annulment proceedings formally commenced (see note 1 on attached page) i.e. have you completed a 'Form A' for your solicitor?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Name and address of the solicitor acting for you	<input type="text"/>	
Do you authorise the Pensions Section to provide the solicitor named above with such pension information as he/she may request in relation to your benefits in the LGPS?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Do you wish to be sent copies of any correspondence sent to your solicitor?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Please confirm the type of relationship to be dissolved (see note 2 on attached page)	<input type="text"/>	
Signature	<input type="text"/>	
Your date of birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	

## Notes

### 1) Divorce or annulment proceedings must have commenced under one of the following:

- Part II of the Matrimonial Causes Act 1973 or Part III of the Matrimonial and Family Proceedings Act 1984 (England and Wales powers in relation to domestic and overseas divorce, etc), or
- Part III of the Matrimonial Causes (Northern Ireland) Order 1978, or Part IV of the Matrimonial and Family Proceedings (Northern Ireland) Order 1989 (corresponding Northern Ireland powers), or
- the Family Law (Scotland) Act 1985 or Part IV of the Matrimonial and Family Proceedings Act 1984 (corresponding Scottish powers).

### 2) Type of relationship to be dissolved; please choose one of the following:

- Opposite sex marriage
- Same sex marriage
- Opposite sex civil partnership
- Same sex civil partnership

### Data Protection

By completing this form, you understand that the information given will be collected, processed and stored, in accordance with relevant data protection legislation. The West Midlands Pension Fund (the Fund) as a data controller, employs strict security measures that protect your personal data. Further information on how the Fund manages your personal data is available on our website [www.wmpfonline.com/about-us/governance/privacy-notice](http://www.wmpfonline.com/about-us/governance/privacy-notice). The Fund's Data Protection Officer can be contacted via email at [wmpfdataprotectionofficer@wolverhampton.gov.uk](mailto:wmpfdataprotectionofficer@wolverhampton.gov.uk)

Please see the schedule of charges on the next page.

# Schedule Of Charges – Pension Sharing On Divorce

Procedure	Comments	Cost
<ul style="list-style-type: none"> <li>Produce full CETV quotation (member or Court does not stipulate deadline for production).</li> </ul>	Standard annual entitlement under PSA 1993 (to be provided within three months of relevant date).	£0
<ul style="list-style-type: none"> <li>Produce full CETV quotation (member or Court requires within three months).</li> </ul>	Standard CETV under PSA 1993 (to be provided within deadline requested).	£100* + VAT
<ul style="list-style-type: none"> <li>Assess the value of the pension in payment, including any contingent benefits.</li> </ul>		£250* + VAT
<ul style="list-style-type: none"> <li>Additional CETV quotations</li> <li>Based on same dates</li> <li>Based on different dates</li> </ul>		£40* + VAT per additional quotation £100 * + VAT per additional quotation
<ul style="list-style-type: none"> <li>Provision of other information.</li> </ul>	If under disclosure of information regulations. Otherwise, depending on nature of request.	£0 to £100* + VAT
<ul style="list-style-type: none"> <li>Receipt of pension sharing order or consent order where the spouse (the credited member) is under 65.</li> </ul>	To cover all administration costs from receipt of pension sharing order to completion of pension payments.	£500 + VAT
<ul style="list-style-type: none"> <li>Establish a new pensioner record where the spouse (the credited member) is 65 or over.</li> </ul>	To cover all administration costs from receipt of pension sharing order to completion of pension payments.	£500 + VAT
<ul style="list-style-type: none"> <li>Assuming all documentation is in place, settle a transfer out (instead of 6).</li> </ul>	This only applies if the credited member asks for a transfer out at the outset. Otherwise, the charges in 6 will apply and no additional charge will be levied if the credited member subsequently asks for a transfer out.	£200 + VAT
<ul style="list-style-type: none"> <li>Objections to order by scheme.</li> </ul>	Onus should be on the draftsman of the order to ensure that it is correctly draft prior to issue.	Costs for dealing with inoperable orders will be passed on.

## Payment of Charges

### Notes

- Any additional costs arising if specialist actuarial, legal, etc. advice is requested will be charged in full in addition to the figures quoted above.
  - Where a scheme member has an Additional Voluntary Contribution contract under the LGPS, the insurance company, etc. may charge for the provision of information. Any such charges will be charged in full in addition to the figures quoted above.
  - Any reasonable administrative costs incurred or likely to be incurred in a complying with an “earmarking order” will be charged to the pensioner member.
  - Any costs incurred in relation to a “pension sharing order” which is made the subject of an application for leave to appeal out of time will be recovered by the authority administering the pension fund.
  - VAT will be payable in addition to all the above charges.
  - All charges are correct at the time of production of this charging schedule (February 2001). The authority administering the pension fund will increase its charges each April by RPI (over the 12 months to the previous September).
  - The standard practice of the authority administering the pension fund is that an invoice will be issued for the charges marked with an “\*”. All other charges can either be paid
    - in full at the point of action, by either party to the divorce, or
    - by part payment at the point of action, by either party to the divorce, with the balance being deducted from either the cash value awarded to the ex-spouse (the credited member) under the sharing order or agreement before it is converted into an annual pension value under the LGPS or, if the credit member wishes to immediately transfer the pension credit to another scheme, from the transfer value payable in respect of the credited member, or
    - by deduction in full from either the cash value awarded to the ex-spouse (the credited member) under the sharing order or agreement before it is converted into an annual pension value under the LGPS or, if the credit member wishes to immediately transfer the pension credit to another scheme, from the transfer value payable in respect of the credited member,
- or
- by deduction in full from any share of a scheme member’s Additional Voluntary Contribution ‘pot’ awarded to the ex-spouse (the credited member) under the sharing order or agreement.
  - The schedule of charge reflects information provided by the Local Government Pensions Committee. The authority administering the pension fund will, however, comply with the charging requirements specified in an order or agreement.