



The Local Government Pension Scheme (Scotland) Regulations 2008/2014/2018

Details of cohabiting partner for survivor's pension

Please read the attached 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): _____

Title (Mr/Ms/Mrs/Miss etc.) _____ National Insurance No:

Address: _____

Post Code:

COHABITING PARTNER'S DETAILS

Surname: _____ Date of Birth: / /

First Name(s): _____

Title (Mr/Ms/Mrs/Miss etc.) _____ National Insurance No:

Address: _____

Post Code:

Shetland Islands Council must be satisfied at time of death that for a continuous period of at least 2 years:

- You have both been free to marry each other or enter into a civil partnership with each other **AND**
- You have lived together as if you were married or registered civil partners¹ **AND**
- Neither of you have been living with someone else as if married or civil partners **AND**
- Your financial affairs have been interdependent (or the nominated partner has been financially dependent upon you, the scheme member)

Member's Signature _____ Date _____

Please return to: Shetland Islands Council, Pensions Section, 8 North Ness Business Park, Lerwick, ZE1 0LZ
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.



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Cohabiting partner - survivor's pension **Explanatory Notes - Please retain for reference**

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 partner¹ and, provided the Scheme member paid into the LGPS on or after 1 April 2009, for an eligible cohabiting partner.

You do not need to nominate a cohabiting partner. By completing the details of cohabiting partner form and returning it to the address shown on the form, will allow us to administer any dependant pension payable quicker.

All of the following conditions must have applied to both you and your cohabiting partner for a continuous period of at least two years prior to death:

- 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 married, or civil partners, and
- neither you nor your nominated cohabiting partner has been living with someone else as if you/they were married or civil partners, and
- either your cohabiting partner is financially dependent on you or you are financially interdependent on each other.

A cohabiting partner pension cannot be paid if all of the above conditions have not been met for a continuous period of at least two years prior to your death.

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 cohabiting partner if:

- Your cohabiting partner satisfies us that the above conditions have been met for a continuous period of at least two years immediately prior to your death.

You and your 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 decided not to pay a pension and your partner believes that he/she has entitlement.

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

Remember to let us know of any change in your circumstances or the relationship ceases to exist.

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¹ 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.

² An entitlement to a cohabiting partner pension ceases to exist if:

- (a) either you or your partner gives us written notice the relationship has ended, or
 - (b) you complete a new form with details 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 married or as if they were civil partners, or
 - (d) your partner dies before you.
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This form is only for providing details of your co-habiting partner to receive a survivor's pension after your death. If you wish to nominate your co-habiting partner to receive any lump sum death gratuity you must also complete a Nomination Form which can be obtained from Shetland Islands Council, Pensions Section, 8 North Ness Business Park, Lerwick, Shetland, ZE1 0LZ Tel. 01595 744644.