

**Nomination of Cohabiting Partner for Survivor's Pension**

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Finance and Central Services

**If you require this information in an alternative language or another format such as large type, audio cassette or Braille, please contact the Pensions Help & Information Line on 01609 536335**

**Explanatory Notes**

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 partner[[1]](#footnote-1) and, provided the scheme member paid into the LGPS on or after 1 April 2008, for a nominated cohabiting partner.

You can nominate a cohabiting partner, of either opposite or same sex, by completing the nomination form and returning it to the address shown on the form.

**However, for the nomination to stand, all of the following conditions must have applied to both you and your nominated co-habiting partner for a continuous period of at least 2 years at the point of death:**

* both you and your nominated co-habiting partner are, and have been, free to marry each other or enter into a civil partnership with each other, and
* you and your nominated co-habiting partner have been living together as if you were husband and wife, or civil partners, and
* neither you nor your nominated co-habiting partner have been living with someone else as if you/they were husband and wife or civil partners, and
* either your nominated co-habiting partner is financially dependent on you, or you are financially interdependent on each other.

A nomination is not valid if all of the above conditions have not been met for a continuous period of at least 2 years at the date of 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 nominated co-habiting partner if:

* the nomination has effect[[2]](#footnote-2) at the date of your death, and
* your nominated cohabiting partner satisfies us that the above conditions had also been met for a continuous period of at least 2 years immediately prior to your death.

You and your nominated co-habiting 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 decide not to pay a pension and your partner believes that he/she has entitlement.

**If you are married or are in a registered civil partnership, please do not complete a survivor’s pension nomination form for your husband, wife or registered civil partner as they are automatically covered for a survivor benefit in the event of your death.**

**Remember to let us know of a change in your circumstances which could affect the nomination, or if you wish to cancel it.**

Partner’s pensions are based on service accrued after 6 April 1988 unless you elected before 1 April 2014 to pay extra to cover service before this date.

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**Nomination of Cohabiting Partner for Survivor's Pension Form**

Please read the explanatory notes before completing the form. If you wish to proceed please complete the form clearly and sign and date the declaration on the next page.

**Your Nominated Partner’s Details**

I nominate my partner, named below, to receive a nominated partner's pension under the Local Government Pension Scheme.

**Partner’s full name**

**Title**

**Date of birth**

**National Insurance Number**

**Home address and postcode**

**Your Details**

**Your full name**

**Title**

**Date of birth**

**National Insurance Number**

**Home address and postcode**

**Employer**

**Payroll Reference Number**

Don’t forget that you and your nominated partner also need to complete the declaration on the next page. The explanatory notes are yours to keep. The completed form and declaration should be sent to:

North Yorkshire Pension Fund

County Hall

Northallerton

North Yorkshire

DL7 8AL

We will register the information and send you a letter confirming that this has been done.

**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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| **Declaration** |

**We confirm that the following apply**

* we are free to marry each other or enter into a civil partnership with each other, and,
* we live together as if we are husband and wife or registered civil partners[[3]](#footnote-3)1, and
* neither of us are living with someone else as if we are husband and wife or civil partners, and
* our financial affairs are interdependent (or the nominated partner is financially dependent upon the Scheme member).

|  |  |
| --- | --- |
| **Your signature** |  |
| **Date** |  |

|  |  |
| --- | --- |
| **Your nominated partner’s signature** |  |
| **Date** |  |

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. [↑](#footnote-ref-1)
2. A nomination ceases to have effect if-

   (a) either you or your nominated partner gives us written notice to cancel the nomination, or

   (b) you make a subsequent valid nomination in favour of a new co-habiting partner, or

   (c) either you or your nominated partner marries, forms a civil partnership or lives with a third person as if they were husband and wife or as if they were civil partners, or

   (d) your nominated partner dies before you. [↑](#footnote-ref-2)
3. 1 For these purposes, two people of the same sex are to be regarded as living together as if they were civil partners if they would be regarded as living together as husband and wife if they were not of the same sex.

   V4\_Oct 2023 [↑](#footnote-ref-3)