

Pension Sharing Annex under [section 24B of the Matrimonial Causes Act 1973] [paragraph 15 of Schedule 5 to the Civil Partnership Act 2004]

In the Family Court sitting at

*[Principal Registry of the Family Division]

Case No.
(Always quote this)

Transferor's Solicitor's
reference

Transferee's Solicitor's
reference

Between

(Petitioner)

and

(Respondent)

Take Notice that:

On the court

*(delete as appropriate)

- made a pension sharing order under Part IV of the Welfare Reform and Pensions Act 1999.
- [varied] [discharged] an order which included provision for pension sharing under Part IV of the Welfare Reform and Pensions Act 1999 dated / / .

This annex to the order provides the person responsible for the pension arrangement with the information required by virtue of rules of court:

A. Transferor's details

(i) The full name by which the Transferor is known:

(ii) All names by which the Transferor has been known:

(iii) The Transferor's date of birth:

/ /

(iv) The Transferor's address:

(v) The Transferor's National Insurance Number:

B. Transferee's Details

(i) The full name by which the Transferee is known:

(ii) All names by which the Transferee has been known:

(iii) The Transferee's date of birth:

D	D	/	M	M	/	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---	---

(iv) The Transferee's address:

(v) The Transferee's National Insurance Number:

(vi) If the Transferee is also a member of the pension scheme from which the credit is derived, or a beneficiary of the same scheme because of survivor's benefits, the membership number:

C. Details of the Transferor's Pension Arrangement

(i) Name of the arrangement:

(ii) Name and address of the person responsible for the pension arrangement:

(iii) Reference Number:

(iv) If appropriate, such other details to enable the pension arrangement to be identified:

(v) The specified percentage of the member's CEV to be transferred:

__ . __ %

(vi) Where State Pension is to be shared, if the transferor reaches his/her state pension age on or after 6 April 2016 and divorce or dissolution proceedings start on or after that date, then insert the shared weekly amount of State Pension which is payable. For the definition of the shared weekly amount of State Pension please see section 49A(3) of the Welfare Reform and Pensions Act 1999.

D. Pension Sharing Charges

It is directed that: (*delete as appropriate)

*The pension sharing charges be apportioned between the parties as follows:

or

*The pension sharing charges be paid in full by the Transferor.

- E.** Have you filed Form D81 (Statement of Information for a Consent Order for a financial remedy)?

☐ Yes

☐ No

If 'Yes' delete the text opposite.

The parties certify that:

(i) they have received the information required by Regulation 4 of the Pensions on Divorce etc (Provisions of Information) Regulations 2000; and
(ii) it appears from that information that there is power to make an order including provision under [section 24B of the Matrimonial Causes Act 1973] [paragraph 15 of Schedule 5 to the Civil Partnership Act 2004].

- F.** In cases where the Transferee has a choice of an internal or external transfer, if the Transferee has indicated a preference, indicate what this is.

☐ Internal transfer

☐ External transfer

- G. In the case of external transfer only (recommended but optional information)**

(i) The name of the qualifying arrangement which has agreed to accept the pension credit:

(ii) The address of the qualifying arrangement:

(iii) If known, the Transferee's membership or policy number in the qualifying arrangement and reference number of the new provider:

(iv) The name, or title, business address, phone and fax numbers and email address of the person who may be contacted in respect of the discharge of liability for the pension credit on behalf of the Transferee:

(This may be an Independent Financial Advisor, for example, if one is advising the Transferee or the new pension scheme itself.)

(v) Please attach a copy of the letter from the qualifying arrangement indicating its willingness to accept the pension credit

Please complete boxes H to J where applicable

- H.** Where the credit is derived from an occupational scheme which is being wound up, has the Transferee indicated whether he wishes to transfer his pension credit rights to a qualifying arrangement?

☐ Yes

☐ No

- I. Where the pension arrangement has requested details of the Transferor's health, has that information been provided? ☐ Yes ☐ No
- J. Where the pension arrangement has requested further information, has that information been provided? ☐ Yes ☐ No

Note: Until the information requested in A, B, (and as far as applicable G, H, I and J) is provided the pension sharing order cannot be implemented although it may be made. Even if all the information requested has been provided, further information may be required before implementation can begin. If so, reasons why implementation cannot begin should be sent by the pension arrangement to the Transferor and Transferee within 21 days of receipt of the pension sharing order and this annex.

THIS ORDER TAKES EFFECT FROM the later of

- a. the date on which the Decree Absolute of Divorce or Nullity of marriage is granted, or the Final Order of Dissolution or Nullity of civil partnership is made;
- b. 28 days from the date of this order or, where the court has specified a period for filing an appeal notice, 7 days after the end of that period;
- c. where an appeal has been lodged, the effective date of the order determining that appeal.

To the person responsible for the pension arrangement:

*(delete as appropriate)

- *1. Take notice that you must discharge your liability within the period of 4 months beginning with the later of:
 - the day on which this order takes effect; or
 - the first day on which you are in receipt of –
 - a. the pension sharing order including this annex (and where appropriate any attachments);
 - b. in a matrimonial case, a copy of the decree absolute of divorce or nullity of marriage;
 - c. in a civil partnership case, a copy of the final order of dissolution or order of nullity of civil partnership;
 - d. the information specified in paragraphs A, B and C of this annex and, where applicable, paragraphs G to J of this annex; and
 - e. payment of all outstanding charges requested by the pension scheme.
- *2. The court directs that the implementation period for discharging your liability should be determined by regulations made under section 34(4) or 41(2)(a) of the Welfare Reform and Pensions Act 1999, in that: