Request to Participate

*Employer request to participate in L&G Master Trust*

To be completed by a department wishing to participate in CSVACs, Partnership or Concord. The scheme set up process takes 2-3 months minimum. Contributions should not be taken from members until the scheme set up has been completed.

If you wish to set up more than one of the schemes, for example CSAVCs and Concord, you will need to complete a form for each scheme.

| Employer name  (Full legal name) |  |
| --- | --- |
| Registered address |  |
| Legal status of employer  (Delete those which are not applicable) | Civil Service Department/ Charity/ Limited Company/ Public Limited Company/ Other (Please specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Employer status in Civil Service Pensions  (Delete those which are not applicable) | Civil Service / New Fair Deal / Schedule 1 / Schedule 25 (5) |
| Do you currently participate in any schemes under the Master Trust?  (Delete those which are not applicable) | CSAVCS / Partnership / Concord/ We do not currently participate in the Master Trust |
| Scheme you wish to participate in within the Master Trust  (Delete those which are not applicable) | CSAVCS / Partnership / \*Concord  Additional information is required when making an application to join Concord, please see below. |
| Date to join the scheme  **The date you choose will be drafted into the deed of participation and must be adhered to.**  **This date must be on the 1st of the month at least one complete month in advance.** |  |
| Date contributions are first deducted from employees  **Contributions should not be deducted until the scheme has been set up. If contributions have been deducted then all requests from Legal & General must be responded to promptly to ensure the scheme can be set up without delay.** |  |

**FOR CONCORD ONLY**

*The Concord pension account can be provided for people who do not qualify for membership of the alpha or partnership. Contribution rates are set by the employer but must comply with Automatic Enrolment legislation.*

| Contribution Rates | Employer Contribution Rate %  Employee Contribution Rate % |
| --- | --- |
| Please confirm the reason you wish to use Concord and how many employees/workers will be enrolled. |  |
| Please specify the definition of pensionable salary |  |

| **In order to participate in the L&G Master Trust the employer must complete a Deed of Participation. So that the deed can be provided, please confirm the execution details required in order to allow you to execute a legally binding deed.**  **Please note: Civil Service Pensions cannot provide guidance on your organisational requirements and recommend that you refer the matter to your legal adviser.** | |
| --- | --- |
| Number of signatories required |  |
| Name and job title of  Signatory 1 |  |
| Name and job title of  Signatory 2 |  |
| Name and job title of  Signatory 3 |  |
| Name and job title of  Signatory 4 |  |
| Will the signatory/ signatories sign on their own authority or under delegated authority? | Yes/ No  If Yes please specify the delegation: |
| Will you use a seal? |  |

*Supplementary Notes:*

1. *The deed is a Deed of Participation in a Pension Master Trust and is written under English Law.*
2. *For Public Sector Organisations we can confirm that the principles established in the case of Carltona vs. Commissioner of Works 1943 can be applied; however, we ask that the Official(s) should hold a Senior role and that the role held is relevant to the transaction.*
3. *If you have an execution block available, please provide this.*
4. *Email the completed form to* [*DC.Provider@cabinetoffice.gov.uk*](mailto:DC.Provider@cabinetoffice.gov.uk)
5. *Late payment of pension contributions may result in the employer being reported to The Pension Regulator.*

**By signing below you agree to adhere to the scheme set up date and respond to all requests from Legal & General without delay.**

**Signature:**

**Print Name:**

**Contact Email:**

**For Cabinet Office use only**

| Date Received | Date Checked (Initial + date) | Date sent to L&G |
| --- | --- | --- |
|  |  |  |