

September 2015

The Highland & Western Isles Valuation Joint Board Flexible Retirement Application Form

(Member of Local Government Pension Scheme only)

You should use this form to make a request to reduce hours or to work in a lower graded post under the Flexible Retirement Scheme. Before completing this form you should read the guidance and refer to the flow chart & process document along with FAQs. The form can be saved and printed or emailed.

Completed forms should be forwarded to the Assessor and copied to your line manager.

Name:		Service:	
Address:		Job Title:	
Payroll Number:		Name of Line Manager:	
Current Weekly Contractual Hours:		Member of Local Government Pension Scheme (2 years or more)	Yes <input type="checkbox"/> No <input type="checkbox"/> (Please tick one)

Statement by the Employee

Flexible Retirement Application (please tick one of the following):

- I would like to reduce my contractual hours by at least 40% ☐
- I would like to reduce my grade ☐
- I would like to reduce my contractual hours by at least 40% and reduce my grade ☐

Reduction in Hours

State weekly hours you would like to work and how these hours may be worked (*daily/weekly pattern*)

I think the reduction in my contractual hours will affect my employer and colleagues as follows:

I think the effect the reduction on my contractual hours on my employer and colleagues can be dealt with as follows:

Reduction in Grade

I would like to consider a reduction in grade in the following post(s): *(please specify any current vacancies, include vacancy reference number)*

I think a reduction in grade can be achieved within my current team/Service for the following reasons:

Date on which you wish to commence reduced hours/grade:

Proposed Leaving Date:
(must be within 3 years of commencing flexible retirement)

Declaration and Signature

I have read the guidance notes and understand that full pension benefits must be taken and I am responsible for the cost of reduced pension.

I have not made an application for flexible retirement in the past 12 months.

I understand a reduction in my working hours and/or reduction in grade due to a flexible retirement request will result in a permanent change to my contract of employment.

I understand in requesting flexible retirement, I am providing notice to resign my post which will be effective within 3 years of commencing flexible retirement.

Signed:

Date:

Flexible Retirement Application

Service Use: Statement by Assessor

To be completed by Assessor following meeting with employee to fully discuss request.

Reduction in Hours:

Request can be met within existing post:

Yes ☐ Is this subject to filling remaining hours Yes ☐ No ☐
No ☐ Please provide further details and options agreed with employees as way of assisting with the request

Reduction in Grade: (Please provide details where applicable)

Request can be met within existing team or employee has specified suitable vacancy.

Yes ☐ specify how this will be achieved

No ☐ specify reasons

Confirmation of employee proposed resignation date and any implication for Service:

Date of Meeting with Employee:

The Assessor will confirm decision on request for flexible retirement to employee within 28 working days.

The completed Flexible Retirement application form should be sent to HR. The form will be verified for consistency and either referred back to the department or sent to Pensions to enable the employee to obtain pension figures.

The employee will be required to confirm they are willing to progress the application following receipt of pension figures.

Signature of Assessor

Date: