



Application Form to Join GMPF - Academies

AF2
Version 5

PART A – To be completed by the prospective academy

Please use BLACK INK ONLY

For the purposes of this form Academies also refers to free schools

1. Information about the academy

Please fill in this part in all cases

- 1.1 Name of the academy school:
- 1.2 Name of the academy trust:
- 1.3 Companies House Number:
- 1.4 Academy Trust's full postal address:
- 1.5 General e-mail address for the academy trust:
- 1.6 LEA in which the academy school will operate:
- 1.7 The date from which the academy will begin to operate (*Please note, if this date changes you must inform GMPF immediately and you may be charged for any rework incurred*):
- 1.8 Is there an existing school that is converting to become this academy? ☐ Yes (please complete 1.9 and 1.10)
☐ No (please go to section 2)
- 1.9 Please give the current name of the school:
- 1.10 Who are the employees of the school currently employed by? ☐ The Local Authority
☐ The Governing Body

2. Contact details for the person making this application

Please fill in this part in all cases

- 2.1 Contact name:
- 2.2 Job title:
- 2.3 E-mail address:
- 2.4 Telephone number:

3. Information about the academy's pension function

Please fill in this part in all cases

3.1 Please state who will be carrying out the academy's pension function. Please provide a contact name, e-mail address and telephone number if different to those given in section 2.

- ☐ The academy trust (in-house)
- ☐ A local authority pensions section
- ☐ Other third party

Company Name: _____

Contact name: _____

E-mail address: _____

Telephone no: _____

3.2 Please tick here to confirm that you understand that as a Scheme employer, the academy trust (and main pension administrator if applicable) will be required to adhere to the LGPS Regulations and GMPF procedures, including the Pension Administration Strategy. Your main pension administrator will also be required to attend any pension training deemed appropriate by GMPF.

☐

3.3 If the main administrator named in 3.1 is not the academy trust itself, do you authorise the third party provider to have access to the employee's pension records held by GMPF?

- ☐ Yes ☐ No

4. Accounting information

Please fill in this part in all cases

4.1 Does the academy have to show pension costs in its accounts using FRS102 or IAS19 or other financial reporting standard?

- ☐ FRS102 ☐ IAS 19 ☐ Other _____

4.2 On what date does the academy's accounting year end?

4.3 On what date will the academy's first accounts be due?

PART B – To be completed by the prospective academy AND any ceding employer where relevant

5. Pension costs

Please fill in this part in all cases

5.1 Please state how the academy's pension costs will be managed:

- ☐ Stand alone
- ☐ Pooled with the local authority
Please note: If actuarial pooling with the local authority has been agreed this is on the basis that any ill health retirement costs are a pool charge and that other retirement costs or costs for augmentation are charged directly to the academy.
- ☐ Multi Academy Trust Pooling

6. Transfer Information

Please fill in this part in all cases

6.1 Will employees transfer to the academy?

☐

Yes; from the governing body (Please complete 6.2 and 6.3)

☐

Yes; from the local authority (Please complete 6.2 and 6.3)

☐

No; this is a brand new academy and not a school that has converted to academy status (Please go to section 7)

6.2 Please tick here to confirm that all parties have read and understand the following three conditions:

☐

- (i) Where employees are transferring to the academy trust from the Local Authority or another employer, and where the employees have access to GMPF, the agreed funding position will be as follows:

The academy trust and the ceding GMPF employer agree with the Administering Authority that for the purposes of determining the opening funding position, the past service liability arising before the Effective Date in 1.7 in respect of each Eligible Employee shall be 100% funded using the actuarial factors provided by the Government Actuary's Department for individual cash equivalent transfers between Scheme employers.

- (ii) The **ceding** GMPF employer must submit a leaver notification for each active member of GMPF involved in the compulsory transfer to the academy trust. Leaver notifications should be received by GMPF within two months of the effective date in 1.7
- (iii) As the **new** GMPF employer, the academy trust has a contractual obligation to re-enrol all eligible employees transferring from the ceding GMPF employer (including those that had previously opted out) back into the LGPS with effect from the effective date in 1.7. New starter notifications should be received by GMPF within two months of this date.

6.3 Please tick here to confirm that, for the purposes of determining the academy's opening funding position you have also enclosed a completed GMPF staff list with details of the transferring employees.

☐

7. Declaration and authority

Please fill in this part in all cases

PLEASE NOTE: BOTH THE ACADEMY TRUST AND CEDING EMPLOYER MUST SIGN THIS APPLICATION FORM. THE ONLY EXCEPTION IS WHERE THE APPLICATION IS FROM A BRAND NEW FREE SCHOOL THAT IS NOT ENTERING INTO ANY PENSION COST POOLING ARRANGEMENTS WITH THE LOCAL AUTHORITY, IN WHICH CASE, A SIGNATURE FROM JUST THE ACADEMY TRUST WILL BE ACCEPTED.

To be completed by the Academy Trust

I confirm that I have reviewed the completed application form and have agreed to the decisions made and understand the conditions outlined. I also confirm that I am the person authorised to do this on behalf of the employer.

Name:

Signature:

Position:

Employer:

Email:

Tel No:

Date:

To be completed by the ceding GMPF employer

I confirm that I have reviewed the completed application form and have agreed to the decisions made and understand the conditions outlined. I also confirm that I am the person authorised to do this on behalf of the employer.

Name:

Signature:

Position:

Employer:

Email:

Tel No:

Date:

Application Form to Join GMPF for Academies – Checklist

- ☐ I have read and understood the booklet entitled '***Guide for Prospective Employers - A guide for employers looking to join the Greater Manchester Pension Fund***'.
- ☐ I have read and understood the document entitled '***Application information for prospective academies***'.
- ☐ I have completed all of Part A of this application form and the relevant questions in Part B.
- ☐ If employees are to transfer to the academy, for the purposes of determining the opening funding position I have attached a correct and complete staff list.
- ☐ Where agreements are needed with the ceding employer, these have been made and the ceding employer has completed and signed the declaration in section 7.
- ☐ I understand that I need to send a scanned copy of the completed form by e-mail to GMPF. Any staff list sent by e-mail should be encrypted or sent by secure email. If this is not possible a hard copy should be sent by post and we recommend any information sent by post should be sent by special/recorded delivery to protect member data.

Please now submit your application to GMPF by e-mail to: employersupport@gmpf.org.uk