



# Nomination of Co-Habiting Partner

PLEASE COMPLETE THE FORM IN BLOCK CAPITALS AND BLACK INK

(Last updated 27/07/2018)

## Your Personal Details

Full Name			
Home Address			
			Post Code
Social Security Number			Date of Birth
Email Address		Phone Number	

## Your Partners Details

Full Name			
Home Address			
			Post Code
Social Security Number			Date of Birth

## Evidence of Co-Habiting Partnership

Please give details below of the evidence you are providing to show that you have been in a co-habiting partnership for at least 2 years.


## Joint Declaration

We declare that the following statements are true now, and have been continuously true for at least the last two years:

- We are living together as a couple
- We depend on each other financially
- We are legally free to marry or form a civil partnership, but have chosen not to
- Neither of us is married to, or in a civil partnership with, someone else
- Neither of us is living with someone else as a couple

We understand that if any of these statements are found to be false, the nomination will be invalid. We also understand that the nominated partner will only be entitled to a pension if these conditions have been met continuously for two years preceding the member's death.

**Member's Signature**

Date signed:
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**Partners Signature**

Date signed:
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**Please return on completion to:** Public Employees Pension Team, States Treasury and Exchequer, Cyril Le Marquand House, PO Box 353, St Helier, Jersey, JE4 8UL

## Privacy Notice

As a ‘controller’ under the Data Protection (Jersey) Law 2018 we process and hold your information in order to provide public services and meet our statutory obligations. We may not be able to provide you with a service unless we have enough information or your permission to use that information. Below, we explain what we collect; how we will use your information; and what your rights are.

We have collected your personal details (name; address, contact details; and DOB) and we do this in order to carry out the service you have requested; to monitor and improve our performance; to ensure that we meet our legal obligations; to prevent and detect crime; to process financial transactions including grants or payment of benefits; to allow the statistical analysis of data so we can plan the provision of services; and where necessary, for our law enforcement functions; or to protect individuals from harm or injury.

We will endeavour to keep your information accurate and up to date and not keep it for longer than is necessary. Please see our published retention schedules for more detail about how long we retain your information. We will not pass any personal data on to anyone outside of the States of Jersey, other than those who either process information on our behalf, or because of a legal requirement, and we will only do so, where possible, after we have ensured that sufficient steps have been taken by the recipient to protect your personal data. We do not process your information overseas using web services that are hosted outside the European Economic Area. At no time will your information be passed to organisations for marketing or sales purposes or for any commercial use without your prior express consent.

You can ask us: to stop processing your information; to correct or amend your information; for a copy of the information we hold about you. You can also: request that the processing of your personal data is restricted; and withdraw your consent to the processing of your information.

You can complain to us about the way your information is being used by contacting us at [dataprotection2018@gov.je](mailto:dataprotection2018@gov.je) alternatively you can complain to the Information Commissioner by emailing [enquiries@dataci.org](mailto:enquiries@dataci.org)



# Nomination of a Co-Habiting Partner Guidance Notes

This guidance and form is only for members of the Public Employees Pension Fund (PEPF) Career Average Scheme who wish to nominate a co-habiting partner to receive benefits in the event of their death.

## Why should I complete this form?

The benefit of completing this form is that your co-habiting partner will receive survivor benefits in the event of your death. If you are just a couple who live together, your partner would not automatically receive any benefits in the same way as a husband or wife may or civil partners. By completing this form partner maybe entitled to receive benefits from the Scheme in the event of your death.

## Who can I nominate?

You can nominate your partner of either the same or opposite sex as long as they meet the criteria set out below.

If you do not nominate your partner, they will not receive any benefits no matter how long you have been living together and no matter what evidence they provide.

## What are the criteria for nomination?

You and your partner must meet the following criteria for at least 2 years for your partner to be eligible for nomination as a co-habiting partner.

- both you and your nominated co-habiting partner are, and have been, free to marry each other or enter into a registered civil partnership with each other
- you and your partner have lived together as if you were husband and wife, or registered civil partners
- neither you or your partner have been living with someone else as if you/they were husband and wife or registered civil partners
- either your partner is financially dependent on you or you are financially interdependent on each other. Your partner is financially dependent on you if you have the highest income. Financially interdependent means you rely on your joint finances to support your standard of living. It doesn't mean that you need to be contributing equally.

## What does 'financially interdependent' mean?

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.

## How do I nominate my co-habiting partner?

You can nominate your co-habiting partner, of either opposite or same sex, by completing the nomination form and sending it to Public Employees Pension's Team (PEPT).



You will need to enclose evidence that you have met the conditions continuously or at least 2 years before you both signed the form. Please only supply photocopies of the evidence. If you are unable to provide photocopies, please bring your documentary evidence to the PEPT and we will arrange for it to be copied for you.

Both you and your nominated partner must sign the nomination form.

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

### What types of evidence should we provide?

Below is a non-exhaustive list of typical forms of evidence required to prove your co-habitation. It is recommended that wherever possible the following documents are retained as they may be required as proof of the above conditions:

- A bank statement showing joint names or written confirmation from your bank/building society that you held joint accounts for at least two years,
- A mortgage statement / tenancy agreement showing joint names
- Utility bills if in joint names, one current and one from two years ago.

### What happens next?

Simply complete the form and return it to us at the address provided with the required evidence. We will treat your nomination confidentially and it will be valid as soon as we have received it.

### What happens if I make a nomination and then die?

In the event of your death, your nominated co-habiting partner would receive survivor benefits, including a survivor pension. However, your co-habiting partner will only receive those benefits where a nomination was in effect on the date of your death and your partner can provide evidence that the various criteria have been met.

### What if I wish to change my nomination at a later date?

If your circumstances change and you enter into another partnership which meets the above criteria you should complete a new nomination of a co-habiting partner form. Please remember to let us know of any changes in your circumstances which could affect the nomination, or if you wish to cancel it.

### What if I'm married or in a civil partnership?

If you are married or in a civil partnership you do not need to make a nomination. Your spouse or civil partner is automatically covered for a survivor benefit in the event of your death.

**Please note that nothing stated in this document overrides the legislation and where there is a dispute between what is in this document and the legislation, the legislation will prevail.**