# Extracted Data

## General Details

Status: General Details

Definition: General Details

## Full Scheme Name

Status: Example Pension Scheme (EPS) Pension Fund

Definition: Example Pension Scheme (EPS) Pension Fund

## Scheme Established

Status: 1 May 1974

Definition: 1 May 1974

## Contracted Out

Status: Yes

Definition: Yes

## Contracted Out Ended

Status: 30 April 2003 (when accrual ceased)

Definition: 30 April 2003 (when accrual ceased)

## Post 5 April 1997 Basis

Status: Reference Scheme Test

Definition: Reference Scheme Test

## Equalisation Date

Status: Scheme 1  
Benefits for scheme 1 members have always been equal

Definition: Scheme 2  
1 November 1993

## Section 1 - Payment Terms

Status: Section 1 - Payment Terms

Definition: Section 1 - Payment Terms

## 1.1

Status: 1.1

Definition: Frequency Of Payment

## 1.2

Status: 1.2

Definition: In Advance or in Arrears

## 1.3

Status: 1.3

Definition: Day of Payment

## 1.4

Status: 1.4

Definition: Final Payment on Death

## Section 2 – Retirement Dates and Definitions

Status: Section 2 – Retirement Dates and Definitions

Definition: Section 2 – Retirement Dates and Definitions

## 2.1.1

Status: Normal Retirement Date (“NRD”)

Definition: Normal Retirement Date (“NRD”)

## 2.1.1

Status: Normal Retirement Date (“NRD”)

Definition: Normal Retirement Date (“NRD”)

## 2.2

Status: Early Retirement

Definition: Early Retirement

## 2.2.1

Status: Early Retirement Eligibility

Definition: Early Retirement Eligibility

## 2.2.2

Status: Early Retirement Ill Health Eligibility

Definition: Early Retirement Ill Health Eligibility

## 2.2.3

Status: Early Retirement Serious Ill Health Eligibility

Definition: Early Retirement Serious Ill Health Eligibility

## 2.3

Status: Late Retirement

Definition: Late Retirement

## 2.4

Status: Commutation Available

Definition: Commutation Available

## 2.5

Status: Guarantee Period

Definition: Guarantee Period

## Section 3 – Pension Revaluation in Deferment

Status: Section 3 – Pension Revaluation in Deferment

Definition: Section 3 – Pension Revaluation in Deferment

## 3.1

Status: 3.1

Definition: Pre 6/4/1988 GMP

## 3.1

Status: 3.1

Definition: Post 5/4/1988 GMP

## 3.1

Status: 3.1

Definition: All non GMP benefits

## 3.2

Status: 3.2

Definition: Increase Reference

## Section 4 – Pension Increases in Payment

Status: Section 4 – Pension Increases in Payment

Definition: Section 4 – Pension Increases in Payment

## 4.1

Status: Pre 6/4/1988 GMP

Definition: Pensioner

## 4.1

Status: Post 5/4/1988 GMP

Definition: Pensioner

## 4.1

Status: Pre 6/4/1997 Excess

Definition: Pensioner

## 4.1

Status: 6/4/1997 to   
30/4/1999  
Benefits

Definition: Pensioner

## 4.1

Status: Post 30/4/1999 Benefits

Definition: Pensioner

## 4.2

Status: Date of increase

Definition: Pensioner

## 4.3

Status: Reference month for index linked increases

Definition: Pensioner

## 4.4

Status: Increases given on GMP before GMP Age

Definition: Pensioner

## 4.5

Status: Reduced if negative inflation over reference period?

Definition: Pensioner

## 4.6

Status: Step-up at GMP Age where Normal Retirement Date (“NRD”) falls before GMP Age

Definition: Pensioner

## 4.7

Status: Step-up at GMP Age for any other reason

Definition: Pensioner

## 4.8

Status: Historic Pre 6 April 2006 Inland Revenue Maximum Cases

Definition: Pensioner

## Section 5 – Death Before Normal Retirement Date

Status: Section 5 – Death Before Normal Retirement Date

Definition: Section 5 – Death Before Normal Retirement Date

## 5.1

Status: 5.1

Definition: Widow/Widower’s Pension

## 5.2

Status: 5.2

Definition: Lump Sum

## 5.3

Status: 5.3

Definition: Children’s Pension

## 5.4

Status: 5.4

Definition: Start date of Widow/Widower’s pension

## 5.5

Status: 5.5

Definition: Do benefits cease on remarriage of Widow/Widower?

## 5.6

Status: 5.6

Definition: Commutation available?

## Section 6 – Death After Taking Retirement Benefits from the Scheme

Status: Section 6 – Death After Taking Retirement Benefits from the Scheme

Definition: Section 6 – Death After Taking Retirement Benefits from the Scheme

## 6.1

Status: Qualifying Spouse’s Pension

Definition: Qualifying Spouse’s Pension

## 6.2

Status: Lump Sum

Definition: Lump Sum

## 6.3

Status: Qualifying Children’s Pension

Definition: Qualifying Children’s Pension

## 6.4

Status: Do spouses/children’s/dependants’ pensions start immediately or at the end of the guarantee period?

Definition: Do spouses/children’s/dependants’ pensions start immediately or at the end of the guarantee period?

## 6.5

Status: First increase proportionate for spouses’/dependants’ pension following death of member?

Definition: First increase proportionate for spouses’/dependants’ pension following death of member?

## 6.6

Status: Do benefits cease on remarriage of spouse?

Definition: Do benefits cease on remarriage of spouse?

## 6.7

Status: Commutation available?

Definition: Commutation available?

## Section 7 – Death After Reaching Normal Retirement Date (“NRD”) without having taken Retirement Benefits from the Scheme

Status: Section 7 – Death After Reaching Normal Retirement Date (“NRD”) without having taken Retirement Benefits from the Scheme

Definition: Section 7 – Death After Reaching Normal Retirement Date (“NRD”) without having taken Retirement Benefits from the Scheme

## 7.1

Status: Qualifying Spouse’s Pension

Definition: Qualifying Spouse’s Pension

## 7.2

Status: Lump Sum

Definition: Lump Sum

## 7.3

Status: Qualifying Children’s Pension

Definition: Qualifying Children’s Pension

## 7.4

Status: Start date of spouses’/children’s/dependants’ pension

Definition: Start date of spouses’/children’s/dependants’ pension

## 7.5

Status: First increase proportionate for spouses’/dependants’ pension following death of member?

Definition: First increase proportionate for spouses’/dependants’ pension following death of member?

## 7.6

Status: Do benefits cease on remarriage of spouse?

Definition: Do benefits cease on remarriage of spouse?

## 7.7

Status: Commutation available?

Definition: Commutation available?

## Section 8 – Dependant Definitions

Status: Section 8 – Dependant Definitions

Definition: Section 8 – Dependant Definitions

## 8.1

Status: 8.1

Definition: Qualifying Spouse

## 8.2

Status: 8.2

Definition: Qualifying Child

## 8.3

Status: 8.3

Definition: Young Spouse’s Reduction

## 8.4

Status: 8.4

Definition: Minimum length of marriage before death

## 8.5

Status: 8.5

Definition: Widower/Widower