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**APPLICATION FOR FLEXIBLE RETIREMENT**

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| **EMPLOYEE INFORMATION NOTE** |
| Flexible Retirement allows you to draw your pension benefits while continuing in your employment with the council. Applicants must be at least 55 years of age, with 2 or more years of pension scheme membership and reduce either the hours they work or their grade. Please note that drawing your pension early may result in a reduction of pension benefits.Applications for flexible retirement require the consent of the council. If you request a reduction in hours, it will help the council reach a decision if you provide information on your preferred working pattern. When completing the Business Case section, think about the effect this change will have both on the work that you do and on your colleagues. If your request is granted, this will be a permanent change to your terms and conditions. |

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| **PERSONAL DETAILS** (please PRINT) |
|  |
| Name: |  | Date of Birth: |  |  |
|  |
| Employee No: |  | NI No: |  |  |
|  |
| Designation: |  |  |
|  |
| Manager’s Name: |  |  |
|  |
| Service Area: |  |  |
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| **ELIGIBILITY AND CONDITIONS OF APPLICATION** |
| I wish to apply for flexible retirement in accordance with Regulation 29(6) of the Local Government Pension Scheme (Scotland) Regulations 2014. The conditions relating to my application are confirmed below:(Please ✓ to confirm or provide details where appropriate) |
| * I am 55 years of age or over
 |  |  |
|  |
| * I have 2 or more years of pension scheme membership
 |  |  |
| * I understand that I require to reduce my hours of work by a minimum of 20% or reduce my grade
 |  |
|  |  |
| * I understand that flexible retirement involves early payment of my pension benefits which may be subject to actuarial reduction
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| * I confirm that I would like to apply for flexible retirement for a period of no less than 6 months prior to my final retirement date
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| * I understand that flexible retirement will constitute a permanent contractual adjustment until my final retirement date
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**Please complete either Option 1 or Option 2**

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| OPTION 1 |
| * I wish to apply for flexible retirement on the basis of reducing my hours of work by a minimum of 20%.
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| * My current weekly hours of work are:
 |  | hours |  | mins |  |
|  |
| * I request to reduce my weekly hours of work to:
 |  | hours |  | mins |  |
|  |
| * If you have a preferred working pattern please enter the details below :
 |
| DAYS | HOURS | TIMES WORKED |
| Monday |  |  |
| Tuesday |  |  |
| Wednesday |  |  |
| Thursday |  |  |
| Friday |  |  |
| Saturday |  |  |
| Sunday |  |  |

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| OPTION 2 |
| * I wish to apply for flexible retirement on the basis of reducing my salary grade and maintaining my current working hours.
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| COMMENCEMENT |
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| * I request my flexible retirement to take effect from –
 | Date: |  |  |
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| BUSINESS CASE |
| For flexible retirement to be granted it should be mutually beneficial to both the employee and the council.  Please detail below how you think your request for flexible retirement will impact on the council, if granted, and how that impact could be dealt with. Consider cost, service provision, staff resources etc. |
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| CONFIRMATION OF APPLICATION REQUEST |
| Employee’s Signature: | Date:  |

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| FOR INTERNAL USE ONLY – TO BE COMPLETED BY LINE MANAGER |

Please tick the appropriate statement below:

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| * Request has been discussed with the relevant Head of Service and Senior Human Resources Adviser and is approved in principle. Estimated figures to be prepared.
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| * Request has been discussed with the relevant Head of Service and Senior Human Resources Adviser and cannot be accommodated. Reasons detailed below:
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| Manager’s Name (PRINT): |  |
|  |  |
| Signature: |  |
|  |  |
| Date: |  |

**COMPLETED APPLICATION FORM, WHETHER REQUEST IS APPROVED OR REFUSED, SHOULD NOW BE FORWARDED TO HUMAN RESOURCES**