

# Employer Pensions Notice

## EPN 217

### ‘Thinking about Retirement’ presentation and member handouts

**Audience** This Notice will be of particular interest to:

HR staff who plan to run or arrange pre-retirement seminars for members of the Civil Service pension arrangements who are approaching pension age or who are thinking about retiring.

**Action**

- Use the material, found on our website (details below), in your pre-retirement seminars.
- Note the changes to the electronic copy of the EPG on the website. (If you hold a hard copy of the EPG, destroy the existing section 11 and replace by printing off the new version from the website.)

**Timing** Immediate

#### Background

Chapter 7.1 of the Employers’ Pension Guide says that employers should invite members of the **Civil Service pension arrangements** to a pre-retirement course. We have provided a presentation on the Civil Service pension arrangements to be used in your seminars. The presentation and handouts have now been updated and are available on the Civil Service Pensions website.

The material is designed to help you inform members retiring or thinking about retiring. The material does not cover **partnership** as members have direct contact with their particular pension provider. If you receive enquiries from members in the **partnership** scheme, you must advise them to contact their pension provider.

The information in the material is current at the time of distribution and will be updated as new legislation or changes occur.

The material consists of:

- PowerPoint slide presentation entitled "Thinking about retirement."
- Handouts to give to members
- Useful contacts list
- Thinking about retirement booklet

You will find the presentation, handouts, contacts list and booklet on our website: [www.civilservice-pensions.gov.uk](http://www.civilservice-pensions.gov.uk) > Guidance for Employers > Pensions training > Training for member > Pre-retirement seminar.

The PowerPoint presentation is self explanatory and there are speaker notes accompanying some slides. Although designed for PowerPoint presentations, you can of course print off the material if you do not have access to a projector.

The handouts are much more detailed and give comprehensive information on the retirement process. You will need to add the name and address of your APAC to the handouts.

### **Preparing to give the seminar**

When you, or your training provider, are ready to run a seminar we strongly advise you to visit our website and download the PowerPoint presentation to ensure you have the most up to date version. To download, right click the mouse and use the "save as" option. You will need to print off the handouts and the contacts list to give to those members who are attending. You will need to add your APACs name and contact details to the last page of the handouts. (We suggest that the handouts are given out to members before the seminar.) We have tailored the speaker notes so that the person who delivers the presentation does not need to have a pensions background. The presentation takes around 45 minutes.

We suggest that the speaker reads the member handouts before delivering the presentation so that they are aware of the content. The speaker should not attempt to answer any pensions questions that are not covered by the material. The speaker should recommend members to contact their APAC unless, of course, you have someone from your APAC delivering the presentation.

Most importantly, the presenter must not give advice which might influence or lead a member to making a decision on their pension benefits options.

If you do not have access to our website please contact the Employer Helpdesk (details below) so that we can discuss suitable alternative formats.

### **Consultation**

We are grateful to the various employers, APACs and members who have helped us update this material. If, after running your own seminar, you have further comments or suggestions to make, then please do not hesitate to give your feedback to us. Details of how to contact us are below.

**Reference** EPN 129 and 168

**Contacts** Enquiries about content, distribution or to receive in a different format

**employerhelpdesk@cabinet-office.x.gsi.gov.uk**

**01256 846414**

**Employer Helpdesk, Civil Service Pensions, Grosvenor House, Basing View  
Basingstoke, RG21 4HG**

You can find an electronic (PDF version) of the EPG, all current EPNs and forms on our website [www.civilservice-pensions.gov.uk](http://www.civilservice-pensions.gov.uk) in the Guidance for employers section.

**If this notice is to be circulated to members, then please remove contact details as the helpdesk is for employers only. Members should be directed to your pensions administrator if they have any queries.**