

Application for admission body status



West Midlands Pension Fund

Name of proposed admission body:

Is the body a limited company?: Company number:

Yes No

Is the body a registered charity?: Charity number:

Yes No

Scheme employer that has awarded the contract and guarantor for the admission agreement:

Contact name at scheme employer:

Telephone number:

Email address:

Date contract signed:

Date contract commences:

Date contract due to cease:

Date staff transfer (if different):

Date from which the proposed admission body will provide services or assets in connection with the exercise of a function they are contracted to provide:

Is there provision for the contract to be extended past the expected cease date? (If yes, please provide details.)

This application is being made for admission body status by a body:

- that has a 'Community of Interest' with a scheme employer
- or, that will provide a service of a scheme employer by means of a contract
- or other (if so, please provide details)

• Is the agreement open or closed to new members? Open Closed

• Bond/indemnity (delete as appropriate) guarantee required? Yes No % Please state percentage.

Contact details for main contact at the proposed admission body to be held by the West Midlands Pension Fund for the purposes of this application:

Contact name:

Telephone number:

Address

Email address

Contact name of proposed admission bodies payroll provider: Telephone number:

Address

Email address

Application costs

Please tick to confirm the proposed admission body is aware of the fees* that will be incurred as a result of this application (both legal and actuarial) as referred to in the Fund's online [factsheets](#).

Yes No

*Please note you may receive multiple invoices with respect to legal and actuarial fees.

Pension costs and agreements made

Is the Fund's default pass-through arrangement, as detailed in the Funding Strategy Statement, to apply to this application?

If this is not confirmed within one month of the contract date or no response is provided to this question, the Fund will include the necessary wording in the admission agreement to reflect the pass-through arrangement by default.

Yes No

If the Fund's default pass-through arrangement is to apply, has the relevant wording been included in the service contract? If so, please provide a copy of the provisions and supporting definitions from the service contract at the same time as submitting this application.

If the relevant wording has not been included in the service contract or no response is provided to this question, the Fund will include the necessary wording in the admission agreement to reflect the pass-through arrangement by default.

Yes No

Where the default pass-through arrangement is to apply, has the scheme employer agreed to accept full responsibility for the admission body's assets and liabilities in the Fund on expiry or termination of the service contract (resulting in expiry or termination of the admission agreement) whereby the scheme employer will be responsible for any deficit and/or receive the benefit of any surplus in the Fund in such circumstances?

Yes No

Disclaimer

In our opinions, our organisation has the financial strength to meet the financial obligations it will incur by being an admission body employer in the West Midlands Pension Fund:

Yes No

We are happy for the West Midlands Pension Fund to provide the "guarantor" at any time, with information relevant to covenant strength of the proposed admission body, which may include deficits, recovery periods, etc.:

Yes No

Department for Education approval required for academy guarantors

Academies guaranteeing pass through admission agreements must contact the Education and Skills Funding Agency (ESFA) to request pass through approval. Approval can be requested by completing an [Education and Skills Funding Agency \(ESFA\) enquiry form – Customer type – DFE Online Forms](#), where academies will be required to confirm the contractor, length of contract and number of employees involved in the transfer.

Signature:

Job title:

Print name:

Date:

All boxes must be completed before submission.

Tel: 0300 111 6516

Email: wmpfemployerliaison2@wolverhampton.gov.uk

Web: www.wmpfonline.com