

## University of Warwick Pension Scheme – Heritage Defined Contribution Section

### Retirement Process for Uncrystallised Funds Pension Lump Sums (UFPLS) and Small Lump Sums

1. If considering retirement, please contact the scheme administrator Scottish Widows directly on 0800 028 9548 to request a quote with relevant retirement notification forms
2. Scottish Widows will provide a retirement quote with retirement options through the post to your home address
3. If you have any questions on the retirement pack or wish to clarify what your retirement options are, please contact HR Pensions ([hr.pensions@warwick.ac.uk](mailto:hr.pensions@warwick.ac.uk)) and we can arrange a meeting to discuss it with you
4. If you decide to retire, you must provide notice to your line manager/department in accordance with the terms of your contract.
5. Once your retirement date is confirmed and you have decided on the benefit option you wish to take, liaise with Scottish Widows directly and complete their retirement notification forms and return them to Scottish Widows
6. Evidence of date of birth is required such as a current passport or original birth certificate. Once you have submitted your forms to Scottish Widows, please contact the HR Pensions team ([hr.pensions@warwick.ac.uk](mailto:hr.pensions@warwick.ac.uk)) to arrange a meeting to bring in your original ID so we can certify copy it and verify your date of birth. Alternatively you may provide us with a certified copy\* of your passport or birth certificate.
7. If you have selected an UFPLS or Small Lump Sum, Scottish Widows will make the payment to the Trustee bank account.
8. Once HR Pensions receives from Scottish Widows confirmation of the payment, receipt of your completed forms and has seen your original identification documents, Barnett Waddingham will make payment to your bank account usually within 3 to 4 weeks

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