

1. Cohort 2 – 7 April 2000 to 30 June 2000 plus 1 July 2000 to 5 April 2006

a. Special Firefighter i.e. still in RDS service (same role)

- i. Joined FPS 2006 on or after 6 April 2006 and has remained in the pension scheme to date but didn't elect for modified service under Matthews 1
 - Can buy modified service from start date to date joined FPS 2006
 - Can convert FPS 2006 from standard to special up to 31 March 2015
 - Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

[Individual-Statement-of-Details-Firefighter-conversions v2 clean.docx](#)

- ii. Did not join FPS 2006 and didn't elect for modified service under Matthews 1 – Is this a SD example?
 - Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter.
- iii. Joined FPS 2006 on or after 6 April 2006, has remained in the pension scheme to date and did elect for modified service under Matthews 1
Can buy additional modified service Under age 60 so no immediate pension rights
Over age 60 so has entitlement to immediate pension rights (backdated to age 60)
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. No conversion options
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date to DOL
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
 - Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date to 31 March 2015
 - b. No conversion options as didn't join 2006 scheme
 - c. Automatic right to CD under Sargeant.

- Did not join FPS 2006 and didn't elect for modified service under Matthews 1 – Repeat example from Special FF
 - a. Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter, if not they remain a Special Deferred.

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date of opt out **would this be until start date in 2006 scheme rather than to date of opt out?**
 - b. No conversion options
 - c. As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM. **As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the 2006 standard scheme even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015? They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day. This is also pending policy decision by Home Office with regards to whether a Matthews election can override an opt out decision?**

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to 31 March 2015 – **Would this be up to the point they joined the 2006 scheme as they can't convert?**
 - b. No conversion options
 - c. **As opted out after 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM. If this happens and member buys period of opted out service including any period from 1st April 2022 onwards, rollback will be to the Modified Scheme and member will be deemed to be a firefighter member instead of a deferred member. They will also have the option to conversion options standard to special / special to standard. Rollback under Sargeant would depend on conversion option.**

- Can look to revisit original conversion option.
- Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

- iv. Did not join FPS 2006 however, did elect for modified service under Matthews 1
 - Can buy additional modified service up to the point they joined under Matthews 1

- then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter.

b. Special Deferred i.e. left service before age 55

- i. Under age 60 so no immediate pension rights
- ii. Over age 60 so has entitlement to immediate pension rights (backdated to age 60)
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. No conversion options
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date to DOL
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
 - Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date to 31 March 2015
 - b. No conversion options as didn't join 2006 scheme
 - c. Automatic right to CD under Sargeant.
 - Did not join FPS 2006 and didn't elect for modified service under Matthews 1 – Repeat example from Special FF
 - a. Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter, if not they remain a Special Deferred.
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date of opt out **would this be until start date in 2006 scheme rather than to date of opt out?**
 - b. No conversion options
 - c. As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.
As policy/regs stand at the moment, in this scenario would they only

be able to be rolled back to the 2006 standard scheme even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015? They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.

This is also pending policy decision by Home Office with regards to whether a Matthews election can override an opt out decision?

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to 31 March 2015 – Would this be up to the point they joined the 2006 scheme as they can't convert?
 - b. No conversion options
 - c. As opted out after 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM. If this happens and member buys period of opted out service including any period from 1st April 2022 onwards, rollback will be to the Modified Scheme and member will be deemed to be a firefighter member instead of a deferred member. They will also have the option to conversion options standard to special / special to standard. Rollback under Sargeant would depend on conversion option.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) and elected for modified service under Matthews 1
 - a. Can buy modified service from start date up to the point they joined Matthews 1
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) and elected for modified service under Matthews 1
 - a. Can buy modified service from start date up to point they joined Matthews 1
 - b. No conversion options
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
- Did not join FPS 2006 however, they did elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date up to the point they joined Matthews 1
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Did not join FPS 2006 however, they did elect for modified service under Matthews 1, has since left employment (after 31 March 2015)

- a. Can buy modified service from start date up to point they joined Matthews 1
 - b. No conversion options as didn't join 2006 scheme
 - c. Automatic right to CD under Sargeant.
- Did not join FPS 2006 however, they did elect for modified service under Matthews 1 – Repeat example from Special FF
 - a. Can buy modified service from start date up to the point they joined Matthews 1, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter, if not they remain a Special Deferred.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, and did elect for modified service under Matthews 1
 - a. Can buy modified service from start date up to point they joined Matthews 1
 - b. No conversion options
 - c. As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.
 As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the 2006 standard scheme even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015? They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.
 This is also pending policy decision by Home Office with regards to whether a Matthews election can override an opt out decision?
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, and the did elect for modified service under Matthews 1
 - a. Can buy modified service from start date up to the point they joined Matthews 1
 - b. No conversion options
 - c. As opted out after 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM. If this happens and member buys period of opted out service including any period from 1st April 2022 onwards, rollback will be to the Modified Scheme and member will be deemed to be a firefighter member instead of a deferred member. They will also have the option to conversion options standard to special / special to standard. Rollback under Sargeant would depend on conversion option.

c. Special Pensioners i.e. left service after age 55

- i. Immediate pension right which should be backdated to age 55
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS** in payment.

- a. Can buy modified service from start date to date joined FPS 2006
 - b. Can convert FPS 2006 from standard to special up to DOL
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Question mark over conversion options – Flagged to HO
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Can convert FPS 2006 from standard to special up to 31 March 2022
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - d. If don't convert, they will only be purchasing modified service up to the day before they joined the 2006 scheme and this will be a deferred benefit payable from age 60. Rollback under Sargeant remedy period will be to the standard 2006 scheme
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Question mark over conversion options – Flagged to HO
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - d. If don't convert (or conversion isn't possible), they will only be purchasing modified service up to the day before they joined the 2006 scheme and this will be a deferred benefit payable from age 60. Rollback under Sargeant remedy period will be to the standard 2006 scheme
- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date to DOL
 - b. Question mark over conversion options – Flagged to HO **Would conversions apply in this case as member didn't join 2006 scheme?**
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date to 31 March 2015
 - b. Question mark over conversion options – Flagged to HO **Would conversions apply in this case as member didn't join 2006 scheme?**
 - c. Automatic right to CD under Sargeant.

- d. If doesn't elect for a CD, any modified service purchased up to 31 March 2015 would be a deferred benefit payable from age 60
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) and elected for modified service under Matthews 1, FPS 2006 pension **IS** in payment.
 - a. Can buy modified service from start date up to the point they joined Matthews 1
 - b. Can convert FPS 2006 from standard to special up to DOL
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) and elected for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date up to the point they joined in Matthews 1
 - b. Question mark over conversion options – Flagged to HO
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) and elected for modified service under Matthews 1, FPS 2006 pension **IS** in payment.
 - a. Can buy modified service from start date up to point they joined Matthews 1
 - b. Can convert FPS 2006 from standard to special up to 31 March 2022
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - d. If don't convert, they will only be purchasing modified service up to the day before they joined the 2006 scheme and this will be a deferred benefit payable from age 60. Rollback under Sargeant remedy period will be to the standard 2006 scheme
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) and elected for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date up to the point they joined Matthews 1
 - b. Question mark over conversion options – Flagged to HO
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - d. If don't convert (or conversion isn't possible), they will only be purchasing modified service up to the day before they joined the 2006 scheme and this will be a deferred benefit payable from age 60. Rollback under Sargeant remedy period will be to the standard 2006 scheme
- Did not join FPS 2006 however, the elected for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start up to the point they joined Matthews 1
 - b. Question mark over conversion options – Flagged to HO

c. As left before 31 March 2015 there is no link to Sargeant.

- Did not join FPS 2006 however elected for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date up to point they joined Matthews 1
 - b. Question mark over conversion options –
Flagged to HO
Automatic right to CD under Sargeant.
 - c. If doesn't elect for a CD, any modified service purchased up to 31 March 2015 would be a deferred benefit payable from age 60

d. Deceased

- i. Death grant for extended limited period
 - Must have died in service before 6 April 2000

- ii. Additional death grant
 - Must have elected to join the scheme under Matthews 1
 - Must die before 31 March 2025, without making an election.

2. Cohort 3 – 1 July 2000 to 5 April 2006 and not given 2014 option

a. Special Firefighter i.e. still in RDS service (same role)

- i. Joined FPS 2006 on or after 6 April 2006 and has remained in the pension scheme to date but wasn't offered the opportunity to elect for modified service under Matthews 1
 - Can buy modified service from start date to date joined FPS 2006
 - Can convert FPS 2006 from standard to special up to 31 March 2015
 - Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - If doesn't convert modified service purchased will be deferred to age 60 and rollback will be to the standard 2006 scheme.

- ii. Did not join FPS 2006 and wasn't offered the opportunity to elect for modified service under Matthews 1 – **Is this a SD example?**
 - Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter.
 - If doesn't submit a CD, any modified service purchased will be deferred to age 60

b. Special Deferred i.e. left service before age 55

- i. Under age 60 so no immediate pension rights
- ii. Over age 60 so has entitlement to immediate pension rights (backdated to age 60)
 - Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006

- b. No conversion options depending on view from Home Office about whether this group can convert if 2006 pension is in payment / not in payment.
 - c. As left before 31 March 2015 there is no link to Sargeant.
 - d. If does not convert (or conversion is not possible) modified service purchased up to the point the member joined FPS 2006 would be deferred to age 60 and roll back position under Sargeant would be to standard 2006 scheme
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. No conversion options depending on view from Home Office about whether this group can convert if 2006 pension is in payment / not in payment.
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - d. If does not convert (or conversion is not possible) modified service purchased up to the point the member joined FPS 2006 would be deferred to age 60 and roll back position under Sargeant would be to standard 2006 scheme
- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date to DOL
 - b. No conversion options
 - c. As left before 31 March 2015 there is no link to Sargeant.
- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date to 31 March 2015
 - b. No conversion options
 - c. Automatic right to CD under Sargeant.
 - d. If elects for CD and repays all conts due, rollback scheme will be Modified Scheme.
- Did not join FPS 2006 and didn't elect for modified service under Matthews 1 – Repeat example from Special FF
 - a. Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter, if not they remain a Special Deferred.
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (before 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to date of opt out **should this be up to date they joined the 2006 scheme as they can't convert as a deferred member?**
 - b. No conversion options

- c. As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.
 - d. As policy/regs stand at the moment, in this scenario would they only be able to be rolled back to the 2006 standard scheme even if they submitted a CD, and wouldn't be able to purchase the service between when they opted out and 31/03/2015? They would however retain the final salary link and be deemed an active FF member as long as there had been less than a 5 year break and they have purchased all opted out service from 1 April 2015 to present day.
This is also pending policy decision by Home Office with regards to whether a Matthews election can override an opt out decision?
- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until opting out (after 31 March 2015) and are still employed, didn't elect for modified service under Matthews 1
 - a. Can buy modified service from start date to 31 March 2015 would this be up to point they joined 2006 scheme rather than 31 March 2015 as they don't have conversion options if they are deferred?
 - b. No conversion options
 - c. As opted out before 31 March 2015 there is no link to Sargeant unless CD claim is submitted and accepted by the SM.
 - d. If member submits a CD and repays all conts for remedy period and post 1 April 2022 they will be deemed to be a FF member and they will have the option to convert standard to special / special to standard? Rollback under Sargeant will depend on conversion option.
 - Joined FPS 2006 on or after 6 April 2006 and has remained in the pension scheme to date but wasn't offered the opportunity to elect for modified service under Matthews 1
Over age 60 so has entitlement to immediate pension rights (backdated to age 60)
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Can convert FPS 2006 from standard to special up to 31 March 2015
 - c. Can convert special to standard FPS 2006 up to date joined FPS 2006
 - d. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.
 - e. If doesn't convert modified service purchased will be deferred until member chooses (as over 60 but still active F/f) to take their pension benefits
- iii. Did not join FPS 2006 and wasn't offered the opportunity to elect for modified service under Matthews 1 – **is this a SD example?**
- Can buy modified service from start date to 31 March 2015, then has an automatic right for a CD under Sargeant but **must** agree to purchase CD and service post 1 April 2022 to be counted as a Special Firefighter.
 - If doesn't submit a CD, any modified service purchased will be deferred to age 60

c. Special Pensioners i.e. left service after age 55

i. Immediate pension right which should be backdated to age 55

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Can convert FPS 2006 from standard to special up to DOL
 - c. As left before 31 March 2015 there is no link to Sargeant.

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (before 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Question mark over conversion options – Flagged to HO
 - c. As left before 31 March 2015 there is no link to Sargeant.

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Can convert FPS 2006 from standard to special up to 31 March 2022
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

- Joined FPS 2006 on or after 6 April 2006 and remained in the pension scheme until DOL (after 31 March 2015) but didn't elect for modified service under Matthews 1, FPS 2006 pension **IS NOT** in payment.
 - a. Can buy modified service from start date to date joined FPS 2006
 - b. Question mark over conversion options – Flagged to HO
 - c. Rollback position for the Sargeant remedy will depend on FPS 2006 conversion decision.

- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (before 31 March 2015)
 - a. Can buy modified service from start date to DOL
 - b. Question mark over conversion options – Flagged to HO
 - c. As left before 31 March 2015 there is no link to Sargeant.

- Did not join FPS 2006 and didn't elect for modified service under Matthews 1, has since left employment (after 31 March 2015)
 - a. Can buy modified service from start date to 31 March 2015
 - b. Question mark over conversion options – Flagged to HO
 - c. Automatic right to CD under Sargeant.

d. Deceased

- #### **i. No provisions under the current regs.**