



ASSOCIATION OF PENSION LAWYERS

APPLICATION TO BECOME A FULL MEMBER

1. Full name (including title):
2. Organisation:
3. Address:
.....
.....
4. Telephone number:
5. Full DX No and Area:
6. E-mail address:
7. Position:
8. Previous organisation:
(if you joined your present organisation less than three years ago)

9. **Local groups:**

Please tick the relevant box if you would be interested in joining one of the following local groups.

- | | |
|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Scotland | <input type="checkbox"/> Midlands |
| <input type="checkbox"/> North East | <input type="checkbox"/> South West |
| <input type="checkbox"/> North West | |

(All members receive mailings for London events in any case).

10. **Existing membership:**

I am already an Associate Member of APL **OR**

I enclose a cheque for £25 Sterling made payable to the Association of Pension Lawyers

11. **Professional qualifications**

I am a **qualified solicitor** in the UK and was admitted on

I am a **qualified barrister/advocate** in the UK and was admitted on

I am not a lawyer qualified in the UK but believe that the Committee should consider me to be suitably qualified as a lawyer by reason of my training and experience as described on a separate sheet attached to this form. **(Please note that trainee solicitors are not eligible for APL membership).**

12. **Current work:**

I have been advising on pension law and practice as a qualified lawyer for the past years.

I have been in private practice as a qualified lawyer for the past three years or more (tick if applicable).

In the last three years my work has been divided as follows:

% of legal advice on non-contentious pensions law and practice

% legal advice on pensions litigation and potentially contentious pensions issues

% legal advice on non-pension matters (including employment and non-pension benefits, tax, commercial, private client and general trusts)

% management (including personnel, administration, supervision, etc)

% other non-legal work (including scheme administration, investment, actuarial work, general consultancy)

(continued overleaf)

12. **Current work and experience (continued):**

In the last three years, I have given detailed legal advice on matters involving the following (please note that it is expected that most applicants will tick only some boxes):

- | | |
|---|--|
| <input type="checkbox"/> drafting scheme documentation | <input type="checkbox"/> incorporating pension trustee company |
| <input type="checkbox"/> pension aspects of corporate sales and acquisitions | <input type="checkbox"/> establishment of unapproved schemes |
| <input type="checkbox"/> mergers of pension schemes | <input type="checkbox"/> drafting/approving investment management agreements |
| <input type="checkbox"/> winding up of defined benefit schemes | <input type="checkbox"/> establishment of common investment funds |
| <input type="checkbox"/> benefit design | <input type="checkbox"/> trustees' court applications/pensions litigation |
| <input type="checkbox"/> payment of surplus to employer from continuing scheme | <input type="checkbox"/> Pensions Ombudsman disputes |
| <input type="checkbox"/> conversion from defined benefits to money-purchase (or vice-versa) | <input type="checkbox"/> other (please specify below or on a separate sheet) |

13. **Other considerations:**

If, having regard to the eligibility criteria in the APL's Constitution, you wish to add to the information given above, please do so on a separate sheet and attach it to this form.

- Please tick this box if you have done so.

14. **Records:**

The APL (and, on its behalf, the Pensions Management Institute) maintains a database of applicants and members as membership records, for the purposes of providing members with information, reminders, renewals and voting forms and generally for pursuing the APL's objects. Similar records are kept by our affiliated Regional Groups. By submitting this application, you will be giving your express consent to the processing by the APL, the PMI and the Regions of your personal data for these purposes and any others which may be approved by the APL's Main Committee from time to time. Enquiries about your personal data held by the APL and the purposes for which it is processed should be addressed to the Secretary.

15. **Applicant's signature:**

.....

Signature of applicant

.....

Date

16. **Attestors' signatures:**

At least one attestor must be someone who works in the same organisation as the applicant and holds a senior position (eg partner or head of department).

At least one attestor must have known the applicant professionally for at least three years.

It is preferable that at least one attestor be a Full Member of the APL.

(a) First attestor:

Full name:

Organisation:

Position in organisation:

I am / am not *[please delete as applicable]* a Full Member of the APL.

I have known the applicant professionally for years.

I have read this application and confirm that, to the best of my knowledge and belief, the information given in this application, particularly items 11, 12 and (where relevant) 13, is correct.

.....

Attestor's signature

Date

(b) Second attestor:

Full name:

Organisation:

Position in organisation:

I am / am not *[please delete as applicable]* a Full member of the APL.

I have known the applicant professionally for years.

I have read this application and confirm that, to the best of my knowledge and belief, the information given in this application, particularly items 11, 12 and (where relevant) 13, is correct.

.....

Attestor's signature

Date