

Administering Authority Administrative Standards

General

| What | When |
|-------------------------------------|--|
| Correspondence and questions raised | We will acknowledge any correspondence or question raised in writing, via email or by telephone within 5 working days of receipt. A full response will be provided within 15 working days. |

Our commitment to new scheme members

| What | When |
|----------------------------------|---|
| Statement of pensionable service | We will issue a statement of pensionable service to a new scheme member within 20 working days of receiving the required data from the scheme member's employer. |
| Transfers in | <p>We will calculate the estimated benefits that a transfer value will buy in the Local Government Pension Scheme (LGPS) and issue a quotation within 20 working days of receiving details from the member's previous pension provider and any additional essential information required from the Department for Work and Pensions.</p> <p>We will request payment of the transfer value within 10 working days of receiving confirmation from the scheme member that the transfer is to be made.</p> <p>We will confirm the actual benefits purchased by the transfer value to the scheme member within 20 working days of confirmation of receiving payment from the scheme member's previous pension provider.</p> |

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Our commitment to existing scheme members

| What | When |
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| Annual Benefit illustrations | We will produce an annual benefit illustration (based on information to 31 March). (Assuming receipt of accurate year-end information from the employer by the stipulated deadline). |
| Benefit estimates | Provided that there are no outstanding queries to be resolved, we will provide the estimate within 20 working days of receiving the estimate request from the employer. Where there are outstanding queries we will provide the estimate within 20 working days of the date the queries are resolved. |
| Paying Additional Pension Contributions (APCs) | We will provide information within 20 working days of receiving a request from a scheme member wishing to pay APCs to buy additional LGPS pension. |
| Retirements | <p>Provided that there are no outstanding queries to be resolved, we will send details of the benefits payable and pay the member's tax free cash lump sum within 20 working days of receiving all the information required from the scheme member's employer and/or the scheme member or the date the benefits become due if later.</p> <p>Where there are outstanding queries we will send details of the benefits payable and pay the scheme member's tax free cash lump sum within 20 working days of the date the queries are resolved.</p> |
| Deaths | We will send details of the benefits payable within 15 working days of receiving all of the information required from the late scheme member's employer and we will pay the lump sum death grant as soon as possible after determining all relevant beneficiaries. |
| Deferred benefits | We will send details of the deferred benefits within 40 working days of receiving all of the information required from the employer. |

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| Refunds | We will pay a refund within 20 working days of receiving the scheme member's formal request for payment. |
| Transfers out | <p>We will issue a quotation, guaranteed for 3 months, within 20 working days of receiving all the information required.</p> <p>We will pay a transfer value within 20 working days of receiving confirmation from the scheme member that the transfer is to be made, and all of the information we require to make payment.</p> |

Our commitment to our deferred scheme members

| What | When |
|-----------------------------------|--|
| Deferred benefit statements | We will provide an annual benefit statement providing details of the current value of their deferred benefits (as increased in line with the Consumer Prices Index). |
| Deferred benefits into payment | We will send details of the benefits payable and pay the tax free cash lump sum within 20 working days of receiving all the information required from the scheme member, or the date the benefits become due if later. |
| Death of a deferred scheme member | <p>We will acknowledge receipt of a notification of the death of a deferred scheme member and start action to put into payment any dependants' benefits within 5 working days of receiving the notification.</p> <p>We will send details of any benefits payable within 15 working days of receiving all required information from the dependants, and will pay any lump sum death grant due as soon as possible after determining all relevant beneficiaries.</p> |

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Our commitment to our pensioner scheme members

| What | When |
|----------------------|---|
| Newsletter | We will send a newsletter to each of our pensioners at least twice a year. |
| Death of a pensioner | <p>We will acknowledge receipt of a notification of the death of a pensioner and start action to put into payment any dependants' benefits within 5 working days of receiving the notification.</p> <p>We will send details of any benefits payable within 15 working days of receiving all required information from the dependants, and will pay any lump sum death grant due as soon as possible after determining all relevant beneficiaries.</p> |

Our commitment to the employers who participate in the LGPS

| What | When |
|-------------------------------|---|
| Procedures, letters and forms | Procedure guidance will be made available to all employers whose employees participate in the LGPS, together with all the other forms and letters the employer will be required to use in carrying out their responsibilities. |
| Changes in Regulations | We will make all our employers aware of any changes to the Local Government Pension Scheme Regulations, and any other relevant legislation, within 15 working days of receiving details of the changes. |
| Other pension information | We will make all our employers aware of any relevant pension information within 15 working days of receiving details. |
| Benefit estimates | Provided that there are no outstanding queries to be resolved, we will provide the estimate within 20 working days of receiving the estimate request from the employer. Where there are outstanding queries we will provide the estimate within 20 working days of the date the queries are resolved. |

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| What | When |
|-----------------|---|
| Confidentiality | We will respect the confidentiality of information exchanged under this agreement and use it only in accordance with the current Data Protection legislation. |
| Training | We will provide training free of charge for the personnel and payroll staff of the employer either when there are relevant changes to the LGPS or at the request of the employer. |

Long term aims

We will continually strive to improve:

- the pensions website;
- the procedure guidance;
- all publicity material, forms and letters;
- training for the employer;
- communications with the employers and scheme members;
- the collection of data in respect of starters, the amendment of a members personal data and the posting of scheme members contributions by electronic means.

Produced by Kent Pension Fund

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