

Our performance standards of service to members

Annex 4

This outlines service standards and response times that you can expect from us. Service standards for employers are covered in Service Level Agreements.

Who	Service	Actions / triggers	Timescale
New active members	Transfers in	Acknowledge the member's request for transfer details, calculate the estimated benefits that a transfer value will buy for the member and issue a quotation, following receipt from the member's previous scheme and any additional essential information required from Her Majesty's Revenue and Customs (HMRC)	Within 10 working days
		Confirm the actual benefits purchased by the transfer value to the member, following receipt of payment from the member's previous scheme and confirmation (where necessary) of the member's accrued guaranteed minimum pension (GMP) from HMRC	Within 10 working days
Existing active members	Benefit estimates	Issue a quotation, following request, in line with estimate policy	Within 10 working days
	Annual Pension Benefit Statement	Send member statement, provided pay details are received from employers promptly after the close of each financial year and that we hold all of the relevant information Statement sent to the member, either by post (to their last known address) or electronically through "my pension online" via the Fund's website The statement will show: <ul style="list-style-type: none"> • the estimated current value of their accrued benefits 	Annually (by 31 August)

		<ul style="list-style-type: none"> the value of their prospective benefits at normal pension age the estimated current value of their death-in-service benefits 	
	Retirements	<p>Send details of the benefits payable following receipt of a leaver notification from the employer</p> <p>Pay the member's tax-free cash lump-sum, following receipt of the information required from the member</p>	Within 5 working days Within 5 working days
	Deaths	<p>Send acknowledgement of death and request for death certificate, following notification of the death</p> <p>Make payment of death benefits following receipt of all necessary information/documentation</p>	Within 5 working days Within 5 working days
	Early leavers	<p>We will send details of the benefit options available, following receipt of leaver information required from the employer</p> <p>We will send notification of deferred benefits either following receipt of a members leaver option form or following no response from the leaver hold letter after 30 days</p>	Within 5 working days Within 20 working days
	Refunds	<p>Provide member with a quotation of the refund payable following no response from the leaver hold letter after 30 days</p> <p>Pay a refund following member's request for payment and bank details</p>	Within 10 working days Within 10 working days
	Transfers out	<p>Issue a quotation (guaranteed for three months) following member's request and confirmation of the member's accrued GMP/State Second Pension from HMRC</p> <p>Pay the transfer value, once confirmation from the member that</p>	Within 10 working days Within 10 working days

		the transfer is to be made and all of the information we require to make payment is received and necessary checks have been carried out on the receiving scheme	
	Newsletters	Send, either electronically or by post, a newsletter (Avon Pension News) to members	At least twice a year
Deferred members	Benefit Estimates	Issue a quotation, following request, in line with estimate policy	Within 10 working days
	Annual Pension Benefit Statement	Provide each deferred member with a benefit statement, showing the current value of their preserved benefits, provided we have a current address	Once a year
	Deferred Benefits into Payment	Provided we hold a confirmed address we will issue the deferred member with a retirement pack. If we cannot confirm the address we will make every effort to trace the deferred member	Within 1 month prior to NPA
	Newsletters	Send, either electronically or by post, a newsletter to members	At least once a year
Pensioner members	Changes in personal details	Update a pensioner's payroll record with any changes to personal details following receiving written notification (by post or email) Due to the nature of payroll administration, such changes may not take effect until a subsequent payroll has been run. Confirmation of changes to bank details will be advised on the next available pay advice	Within five working days
	Newsletter	We will send, either electronically or by post, a newsletter (Avon Pensioner News) to pensioners. This will be sent out with the pension pay advice slips	At least once a year
	Deaths	Acknowledge receipt of a notification of the death of a pensioner and start action to put into payment any dependants' benefits, following notification	Within 5 working days

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