

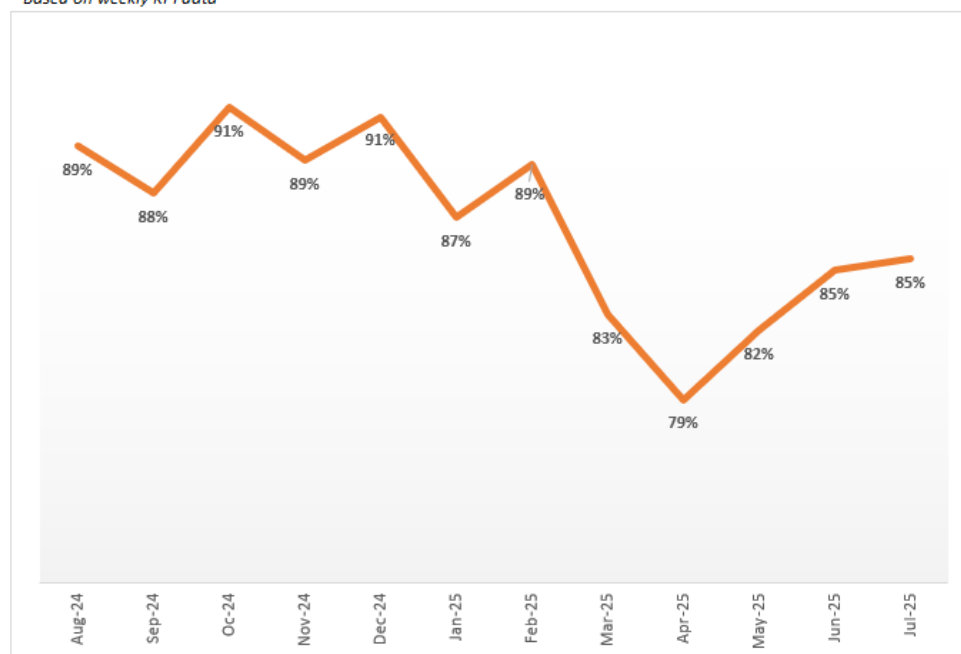
# KPIs and Performance



# SLA monthly performance average Aug-24 to Jul-25

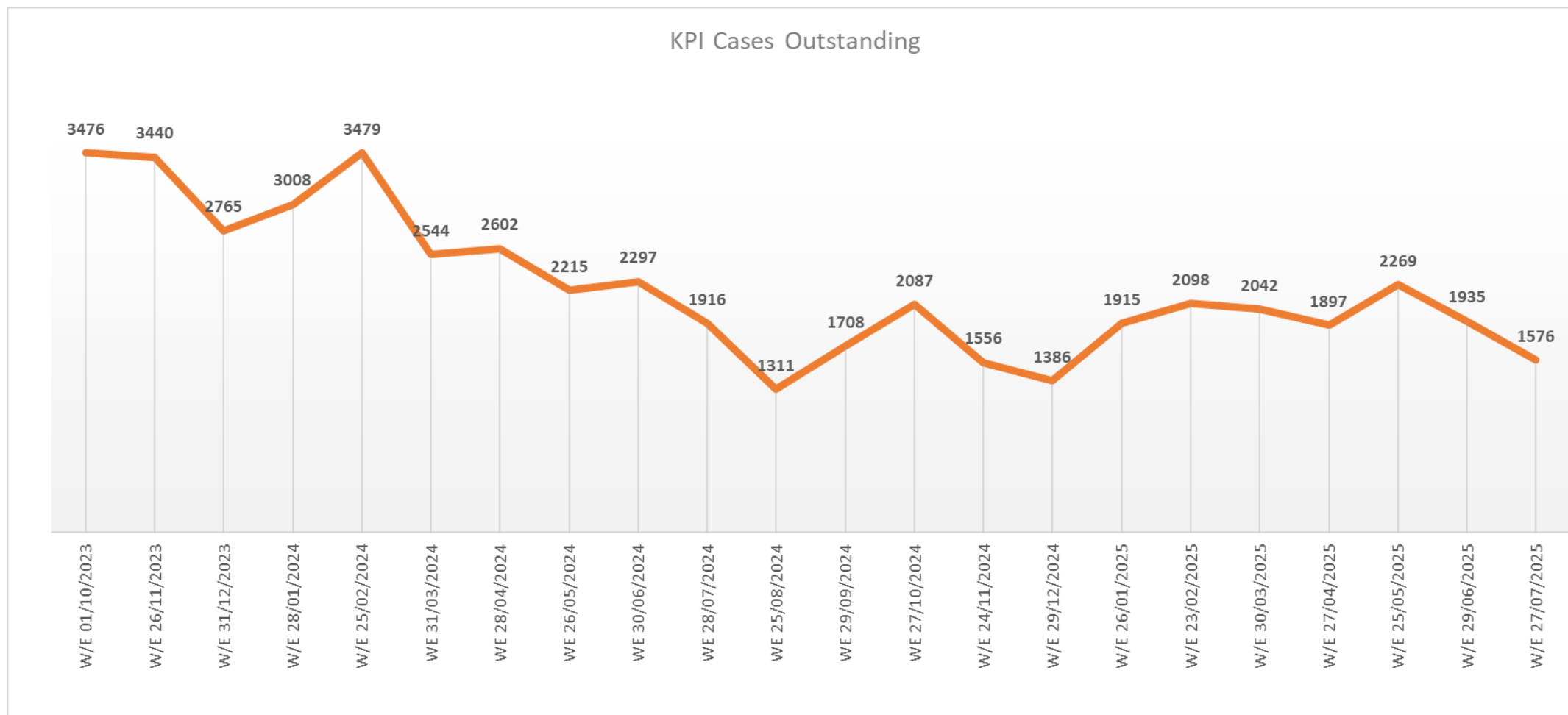
## Average SLA Performance

\*Based on weekly KPI data

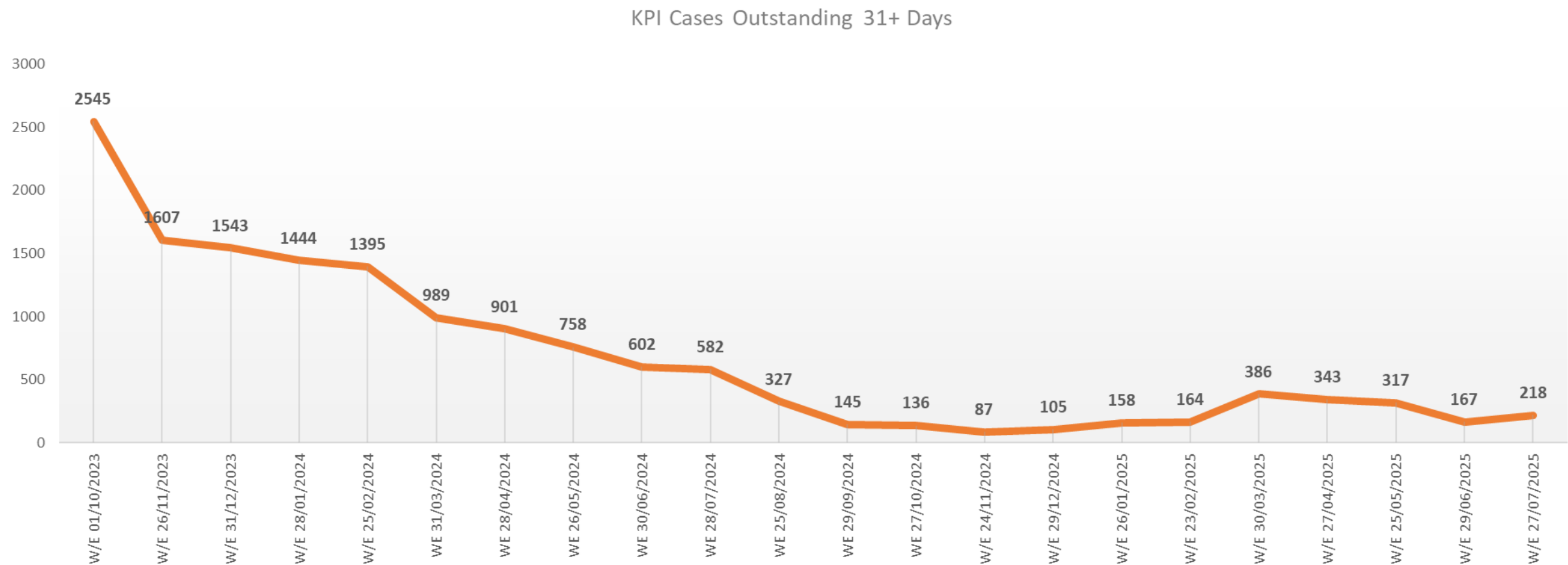


KPI Category	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Cases Created Jul-23 to Jul-25
Death Notification	83.9%	79.1%	94.4%	94.0%	87.6%	100.0%	93.8%	63.8%	71.0%	76.7%	90.6%	97.0%	1,268
Death - Act/Def/Pen - Payment	100.0%	73.4%	67.5%	94.4%	67.7%	81.6%	65.3%	59.9%	49.2%	60.3%	52.6%	70.4%	965
Retirement (Active) - Quote	81.0%	84.9%	84.1%	60.0%	86.3%	45.5%	83.5%	77.7%	80.4%	69.7%	61.7%	76.8%	3,248
Retirement (Active) - Actual	90.7%	94.3%	99.1%	96.7%	96.7%	94.4%	90.1%	83.5%	69.4%	78.5%	80.8%	97.0%	2,077
Retirement (Deferred) - Quote	83.2%	88.9%	88.2%	98.2%	96.2%	73.8%	71.3%	57.0%	25.5%	72.3%	80.7%	68.7%	4,544
Retirement (Deferred) - Actual	97.9%	95.9%	90.7%	98.8%	99.1%	99.0%	98.7%	77.0%	85.5%	77.4%	76.1%	88.5%	2,985
Divorce - Quote	100.0%	100.0%	91.7%	100.0%	100.0%	100.0%	100.0%	100.0%	86.3%	95.5%	100.0%	96.4%	550
Divorce - Actual	100.0%	100.0%	100.0%	33.3%	0.0%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	21
Refund - Quotes	88.4%	88.1%	75.1%	87.9%	66.4%	73.4%	93.3%	72.5%	52.5%	64.1%	67.3%	52.1%	6,089
Refund - Actual	88.0%	91.0%	95.2%	85.3%	81.7%	66.7%	68.6%	61.1%	77.7%	39.3%	70.3%	94.8%	1,978
Deferred Benefits	79.1%	60.9%	95.7%	76.9%	95.1%	92.6%	87.8%	86.0%	83.8%	84.6%	87.9%	97.8%	6,391
Transfer In (Active) - Quote	73.8%	84.7%	91.8%	59.4%	56.6%	97.4%	93.9%	77.1%	60.0%	42.2%	64.9%	58.9%	859
Transfer In (Active) - Actual	55.6%	66.8%	48.0%	51.4%	79.2%	0.0%	56.4%	50.0%	100.0%	63.9%	47.7%	78.6%	379
Transfer Out (Active/Deferred) - Quote	26.2%	16.9%	42.5%	12.1%	46.6%	35.9%	2.8%	9.8%	30.4%	34.8%	27.2%	43.5%	2,359
Transfer Out (Active/Deferred) - Actual	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	83.3%	100.0%	33.3%	100.0%	85.4%	100.0%	240
Employer Estimate - Quote	77.8%	95.0%	94.4%	91.7%	80.8%	94.5%	100.0%	97.5%	92.0%	76.4%	86.4%	90.2%	452
Member Estimate - Quote	92.9%	90.0%	86.9%	98.7%	100.0%	91.9%	97.5%	94.3%	96.3%	87.1%	100.0%	90.9%	1,463
Joiner	100.0%	99.7%	100.0%	100.0%	100.0%	99.6%	100.0%	99.6%	99.8%	99.8%	100.0%	95.4%	25,570
Weighted Average	89%	88%	91%	89%	91%	87%	89%	83%	79%	82%	85%	85%	

# Total KPI's outstanding – Oct 2023 to Jul 2025



# KPI's outstanding over 31 days – Oct 2023 to Jul 2025



# KPI's case by age % - Oct 2023 to Jul 2025

