

**Bath & North East
Somerset Council**



Awarded for excellence



INVESTOR IN PEOPLE



Customer Charter

We will ensure that all our members, deferred members and pensioners are provided, on request, with basic information about the Scheme.



Customer Charter

The aims of the Avon Pension Fund are:

- To deal with you promptly, fairly and efficiently at all times and to give you the best possible service in accordance with our standards.
- To consult you wherever possible and to take account of your views before we make any changes.
- To be accountable for what we do by monitoring the quality of our service and reporting on how well we have lived up to our standards.

These are our standards of service. They specify the maximum turn around times in which we aim to take the action indicated.

Our Commitment To Our New Members

Membership Certificate

We will issue a Membership Certificate to a new member within one month of receiving a completed notification from the member's employer.

Transfers In

We will acknowledge the member's request for transfer details, then calculate the estimated benefits that a transfer value will buy for the member in the Local Government Pension Scheme (LGPS) and issue a quotation within ten days of receiving details from the member's previous scheme and any additional essential information required from the HM Revenue and Customs. We will request payment of the transfer value within five days of receiving confirmation from the member that the transfer is to be made.

We will confirm the actual benefits purchased by the transfer value to the member within ten days of receiving payment from the member's previous scheme and confirmation (where necessary) of the member's accrued Guaranteed Minimum Pension from HM Revenue and Customs.

Our Commitment To Our Existing Members

Benefit Estimates

We will issue a quotation within ten days of receiving the member's special request for an estimate of prospective benefits.

Annual Benefit Statement

Provided pay details are received from employers promptly after the close of each financial year and provided we hold all of the relevant information, we will send each year an Annual Benefit Statement to each member at their last known home address showing the estimated current value of their accrued benefits, the value of their prospective benefits at normal retirement age and the estimated current value of their death-in-service benefits.

Paying Extra Contributions

We will provide information within ten days of receiving a request from a member wishing to pay extra contributions to buy an additional pension.

Retirements

We will send details of the benefits payable and pay the member's tax-free cash lump-sum within fifteen days of receiving all of the information required from the member's employer and/ or the member.

Deaths

We will send details of the benefits payable within seven days of receiving all of the information required from the late member's employer and we will pay the lump-sum death grant within five days of receiving Grant of Probate (or other appropriate documentation) or authorisation from two delegated officers.

Early Leavers

We will send details of the benefit options available within ten days of receiving all of the information required from the employer.

Our Commitment To Our Deferred Members

Refunds

We will pay a refund within five days of receiving the member's formal request for payment.

Transfers Out

We will issue a quotation, guaranteed for three months, within ten days of receiving the member's request and confirmation of the member's accrued Guaranteed Minimum Pension/ State Second Pension (S2P) from the Inland Revenue (DWP).

We will pay a transfer value within five days of receiving confirmation from the member that the transfer is to be made and all of the information we require to make payment.

Newsletter

We will send a Newsletter to each of our current members at least twice a year.

Benefit Statements

We will provide a Benefit Statement within ten days of receiving the deferred member's special request for details of the current value of their preserved benefits (as increased in line with the Retail Prices Index).

Periodic Benefit Statement

We will provide each deferred member with a current address with a Benefit Statement periodically showing the current value of their preserved benefits (as increased in line with the Retail Prices Index).

Preserved Benefits into Payment

Provided we hold an address which has been confirmed we will write to the deferred member requesting an original birth certificate plus the member's National Insurance number before we send details of the benefits that are due and any options that may be available. If we cannot confirm the address we will make every effort to trace the deferred member.

Our Commitment To Our Pensioners

Changes in personal particulars

We will update a pensioner's payroll record with any changes to personal details within five days of receiving the written notification.

However, due to the nature of payroll administration, any 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.

Newsletter

We will send a Newsletter to each of our pensioners at least twice a year.

Change of Tax code

We will update a pensioner's payroll record with a revised tax code within two days of receiving notice of the change from the Inland Revenue. However, due to the nature of payroll administration, any such changes may not take effect until a subsequent payroll has been run.

Deaths of pensioners

We will acknowledge receipt of a notification of the death of a pensioner and start action to put into payment any dependants' benefits within five days of receiving the notification.

Accessibility

This document can be made available in a range of community languages, large print, Braille, on tape, electronic and accessible formats, to request an alternative version please contact the Avon Pension Fund using the details provided.

Comments & Complaints

We welcome and value your comments on the standard of service we provide. If you have any comments you wish to make you can write to us (our address is given below) or call our helpdesk on (01225) 47 7000.

We would also like to hear from you if you are not satisfied about the way you have been treated. If you wish you can speak to Steve McMillan, the Pensions Manager, on his personal number (01225) 39 5254.

AVON PENSION FUND

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