

LGPC Bulletin 255 – September 2024

This bulletin contains updates for all LGPS stakeholders. It includes important articles on:

- [paying death grants to genealogy companies](#)
- [LGPS Scotland – consultation on draft regulations](#)
- [LGPS Scotland – ABS technical guide](#)
- [errors in TPS Club transfer quotations](#)
- [TPR scheme return](#)
- [TPR dashboards compliance and enforcement policy](#)
- [Tell Us Once – official verification of death](#)
- [SAB statement on fiduciary duty](#)

If you have any comments or articles for future bulletins, please contact query.lgps@local.gov.uk.

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LGPS England & Wales

Paying death grants to genealogy companies

On 4 September 2024, we published legal advice on the payment of death grants to genealogy companies.

The legal advice states that it is possible to make payment to a genealogy company in certain circumstances, providing you have carried out the necessary due diligence checks. However, to minimise the risk of paying a death grant to a genealogy company that is not properly authorised, payment should ideally be made to the beneficiary or personal representatives directly.

The advice covers:

- payments made within two years of the date of death, or of the date from which you could reasonably be expected to have become aware of the death
- payments made after that period
- the circumstances in which payment would be made to the Government Legal Department’s Bona Vacantia Division.

You will still need to seek your own legal advice in relation to specific cases, as appropriate.

You can find the advice on the [Legal opinions](#) page of www.lgpsregs.org.

Action for administering authorities

Review the legal advice and consider whether you need to make any changes to your death grant process.

Pensions Review – call for evidence

On 4 September 2024, the Government published a [call for evidence](#) to inform the [first phase of the Pensions Review](#).

The review aims to boost investment, increase pension pots and tackle waste in the pensions system, focusing on defined contribution workplace schemes and the LGPS. The first phase of the review is looking at measures to accelerate asset pooling and increasing investment in ‘productive finance’ in the UK by LGPS funds. The call for evidence asks several questions on:

- scale and consolidation
- costs vs value
- investing in the UK.

We submitted a [response on behalf of the LGPC](#) before the call for evidence closed on 25 September 2024. You can also read the [SAB response to the call for evidence](#) on their website.

The second stage of the Pensions Review is expected to look at the issue of pensions adequacy and fairness, such as the gender pensions gap. We do not have a detailed timetable yet for that work.

SF3 form and guidance notes for 2023/24

On 2 September 2024, MHCLG published their [form and guidance notes for the LGPS fund account return \(SF3\)](#). MHCLG wrote to administering authorities in July to request the data for 2023/24 by 13 September 2024.

MHCLG uses the information to provide a benchmark on administration and fund management. The information is also used in compiling the national accounts and to show the role of the LGPS in the economy.

LGPS Scotland

Consultation on draft regulations

On 2 September 2024, the Scottish Public Pensions Agency (SPPA) launched a consultation on the draft LGPS (Remediable Service) (Amendment) (Scotland) Regulations 2024.

The draft regulations aim to implement the proposals set out in [SPPA Circular 2024/05](#). The regulations also propose further minor technical amendments.

The consultation closes on 28 October 2024. We will share our response with administering authorities.

You can find links to the consultation documents on the [Scheme consultations](#) page of www.scotlgpsregs.org.

Updated and new actuarial guidance

On 3 September 2024, Craig Finlay, Policy Officer at the SPPA, issued new GAD guidance for applying the McCloud remedy to retrospective cases, which took effect immediately.

On 11 September 2024, Craig issued updated transfer GAD guidance. The guidance has been updated to correct errors in the examples and to clarify how to calculate a CETV for a member with underpin protection who is over their critical retirement age or normal pension age for all or part of their pension.

You can find the guidance documents on the [Actuarial guidance](#) page of www.scotlgpsregs.org.

New version of annual benefit statement technical guide published

We have updated the technical guide on annual benefit statements. The latest version (v2.0) reflects our understanding of what must be included in annual benefit statements as a result of the McCloud remedy and the introduction of pensions dashboards from 2025.

We would like to extend our thanks to volunteers from the Lothian Fund, North East Scotland Pension Fund and Strathclyde Fund for giving their time to review the guide.

You can find the annual benefit statement technical guide on the [Administrator guides and documents](#) page of www.scotlgpsregs.org.

Action for administering authorities

Discuss the content of the guide with your software supplier in preparation for issuing annual benefit statements in 2025.

Other news and updates

Errors in TPS Club transfer quotations

The administrators of the Teachers' Pension Scheme (TPS) have alerted us to errors in Club transfer out quotations that they have supplied for members protected

by the McCloud remedy. TPS transfer quotations for these members include two separate calculations:

- Option 1 – final salary build-up for the remedy period, and
- Option 2 – CARE build up for the remedy period.

The errors we are aware of are:

- the transfer values of final salary service built up before 1 April 2015 (tranche 1) are different under Options 1 and 2, even though these appear to be based on the same pay and service figures
- the current pension and transfer values of CARE benefits built up after 31 March 2022 (tranche 3) are different under Options 1 and 2
- the final salary benefits built up in the remedy period in Option 1 are not consistent with the pay and service quoted
- the CARE pension built up in the remedy period in Option 2 is significantly understated.

We are waiting for more information from TPS on how they plan to proceed. Please take extra care when dealing with Club transfers from TPS for McCloud protected members. You may wish to put these cases on hold until we have more information.

There is no indication from TPS that there are any problems with transfer quotations for members who are not protected by the McCloud remedy, or for non-Club calculations.

Please do let us know about any issues you experience in relation to Club transfers for McCloud protected members if they do not appear to be isolated incidents.

Action for administering authorities

Check any Club transfers quotations you have received from TPS carefully. Put the case on hold if the quotation includes errors.

Email query@local.gov.uk with details if you identify any other issues to do with Club transfers for McCloud protected members.

McCloud public service pensions history forms

We have published forms for administering authorities to use as part of the McCloud project. The McCloud public service pensions history form is for collecting information about previous pensions for members who are not protected by the remedy based on their LGPS membership in a particular fund.

We would like to thank members of the Communications Working Group for their help in designing the forms.

Administering authorities are taking different approaches to this part of the project. The new document includes two forms and accompanying member notes which can be adopted for each approach:

1. Ask members to return the form only if they have relevant previous pension membership. The member notes that accompany this form provide greater detail about what membership is relevant for this purpose. Administering authorities who take this approach will need to decide whether a further check is needed when a member who did not complete a form is approaching retirement, dies or requests a transfer out.
2. Ask all members to return the form. Administering authorities who take this approach will receive completed forms that do not affect a member's protection status – members who are already protected, or members who first joined a public service scheme after 31 March 2012, for example. However, administering authorities who take this approach may not have to perform any further checks when a member who has completed a form is approaching retirement, dies or requests a transfer out.

Administering authorities will need to make local changes to the form:

- to fit in with their processes
- to suit the member groups they are making the form available to
- depending on how they make the form available. We have designed the form to be sent by post. If an administering authority makes the form available online, they will need to make sure that it is accessible.

We have used [square brackets] to indicate where we think local changes will be required. Please read the administrator notes carefully before you use the form.

Use the subject filter to find this and all McCloud documents on the:

- [Administrator guides and documents \(England and Wales\)](#) page of www.lgpsregs.org
- [Administrator guides and documents \(Scotland\)](#) page of www.scotlgpsregs.org.

MAPS launches digital Pension Wise appointments

On 9 September 2024, the Money and Pension Service (MAPS) launched digital Pension Wise appointments. Digital appointments will offer equivalent guidance to that offered by telephone and face-to-face appointments. See the [press release from MAPS](#) for more information.

Digital appointments can be accessed at any time, opening the service to those who cannot commit to an appointment in working hours.

Pension Wise appointments, including digital appointments, can be accessed by anyone over 50 with a defined contribution pension.

Tell Us Once is an official verification of death

Tell Us Once (TUC) is an award-winning service that enables people to notify partner organisations of a verified registered death. The instant notification avoids the need for people to contact central Government departments, local government departments (including LGPS administering authorities) and public sector partners individually. It also removes the need for, and cost of, providing multiple copies of a death certificate.

We have been notified that some administering authorities are requesting a death certificate from the next of kin when they are notified of a death through the TUC system. There is no need to do this as the TUC notification can be accepted as an official verification of death. Requesting a death certificate in these circumstances is not compliant with the data sharing agreement that administering authorities agreed to when they signed up to the service.

TPR scheme return

The Pensions Regulator (TPR) will be sending out scheme return notices to managers of public service pension schemes in October 2024. You must complete the scheme return within six weeks of receiving the notification. Completing the scheme return is a legal requirement. If you fail to complete and submit the return by the deadline, you could be fined.

You will need to complete the scheme return using [TPR's online service – Exchange](#). TPR recommends logging into the system to check your scheme contact details. This will ensure that the scheme return and any other communication is sent to the right person.

This year's return will include new questions about your AVCs – your provider(s) and the number of members who hold an AVC with them.

You can find more information about the [public service scheme return](#) on TPR's website.

HM Treasury revaluation issue 2021 and 2022

[Bulletin 249](#) covered the HM Treasury revaluation issue for years 2021 and 2022 in the Firefighters' Pension Scheme and the Armed Forces Pension Scheme.

All affected schemes have amended their regulations to resolve the issue:

- Firefighters' CARE Scheme (England) - amendments took effect from 27 March 2024
- Firefighters' CARE Scheme (Scotland) - amendments took effect from 2 February 2024
- Firefighters' CARE Scheme (Northern Ireland) - amendments took effect from 5 July 2024
- Firefighters' CARE Scheme (Wales) - amendments take effect from 21 October 2024
- Armed Forces CARE scheme (UK) - amendments took effect from 6 May 2024.

Pensions dashboards

TPR Dashboards compliance and enforcement policy

On 5 September 2024, The Pensions Regulator (TPR) published:

- [Pensions dashboards compliance and enforcement policy](#)
- [response to the consultation on the policy](#)
- [updated breach of law guidance](#).

The policy outlines TPR's approach to ensuring occupational pension schemes comply with their dashboard legal duties. It sets out:

- the principles that will drive TPR's approach
- key risk areas TPR will focus on
- what TPR expects schemes to do to comply
- how TPR will monitor compliance
- TPR's approach to non-compliance.

The policy also includes scenarios of non-compliance and how TPR may respond to each one. In particular, the updated breach of law guidance contains an example of how TPR will approach non-alignment of illustration dates between main scheme

benefits and additional voluntary contributions (AVCs). We will update our [Pensions Dashboards Connection Guide](#) and [AVCs and Pensions Dashboards Administrator Guide](#) to refer to these latest publications in due course.

TPR published a [blog on pensions dashboards compliance](#) on the same day to accompany the policy release.

Compliance during the user testing period

TPR expects schemes to connect to the dashboards ecosystem in line with the timeline set out in [DWP's guidance on connection: the stage timetable](#). The timeline has been designed to reduce delivery risk to industry, but it will also ensure that the system can be thoroughly tested to ensure the successful launch of dashboards.

Once schemes and pension providers are connected to the ecosystem the following requirements will apply:

- to remain connected
- to receive 'Find' requests
- to undertake matching, and
- to return 'View' data

TPR expects schemes and providers to take prompt and effective actions to investigate and correct any issues identified during the user testing stage.

Dashboards hot topics

TPR has produced a ['hot topics' article](#) focusing on some of the issues it is hearing about through its engagement with the industry. This includes:

- connecting in line with the dates in the DWP guidance
- how dashboard duties apply to a change of administrator
- TPR's approach to compliance and enforcement.

Draft technical standards - version 1.1

The Pensions Dashboards Programme (PDP) published version 1.1 of the [draft technical standards](#) on 4 September 2024. All PDP standards are published as 'draft' until approved by the Secretary of State for Work and Pensions.

The standards outline a common set of connectivity mechanisms and interfacing rules for pension providers and schemes, and dashboard providers. They determine how these parties will interact with and communicate with the central digital architecture and each other.

PDP blog on updated code of connection

On 12 September 2024, Chris Curry, PDP Principal, published a [blog on the updated code of connection](#). The blog outlines:

- what the code of connection is
- who it applies to
- what has been updated, and
- what PDP is working on publishing next.

The [updated code of connection \(version 1.1\)](#) was published on 21 August 2024, which we covered in [Bulletin 254](#).

PDP confirms identity service provider

PDP has confirmed that users of pensions dashboards will verify their identity with GOV.UK One Login. This will make it easier for those who have previously registered with One Login for other Government services.

The identity service for dashboards will ensure that people must prove who they are before they can access confidential pensions information.

You can read more on the [PDP news page](#).

Training

LGPS Governance Conference 2025

The LGPS Governance Conference is open for booking. It will take place on 30 and 31 January 2025 at the Bournemouth Highcliff Marriott Hotel. You can join us in person or online.

The Conference is aimed at councillors and others who attend pension committees and local pension boards. Previous attendees also include trade union and employer representatives, as well as officers.

You can view the programme and book on the [LGA events website](#). In person places are limited, so we recommend booking early to avoid disappointment.

Fundamentals training 2024

Our 2024 Fundamentals training is open for booking.

Fundamentals is a three day training course aimed at councillors and others who attend pension committees and local pension boards. The course provides a scheme overview and covers current issues in LGPS administration, investment

and governance. Attending all three days will help delegates meet the relevant requirement for knowledge, skills and understanding required in statute or encouraged by relevant guidance. All sessions are delivered by experts in their field.

See the [Fundamentals 2024 draft course programme](#) for full details. The timings shown apply to the in-person sessions.

We are running the training online using Zoom and in person in London and York. We will deliver each day of the online sessions over two half days. You only need to complete one booking for each day, this will automatically book you on both the half days. It is not possible to book for one half day.

Cost

In person: £290 plus VAT per day (includes lunch and refreshments)

Online: £250 plus VAT per day.

Booking your place

We recommend early booking as places are limited. You can book online through the [LGA events website](#). Only member councils of the LGA can pay by invoice. All other organisations must pay by credit/debit card.

Each event listed below has a link to the booking page for that day.

[Fundamentals day 1: York 10 October 2024](#) - Registration closes 2 October 2024

[Fundamentals day 1: London \(LGA offices\) 16 October 2024](#) - closes
1 October 2024

[Fundamentals day 1: Online 23 and 30 October 2024](#) - closes 15 October 2024

[Fundamentals day 2: York 5 November 2024](#) - closes 21 October 2024

[Fundamentals day 2: London \(LGA offices\) 13 November 2024](#) - closes
29 October 2024

[Fundamentals day 2: Online 21 and 28 November 2024](#)

[Fundamentals day 3: York 4 December 2024](#)

[Fundamentals day 3: London \(LGA offices\) 10 December 2024](#)

[Fundamentals day 3: Online 12 and 17 December 2024.](#)

Training service

All training events are available to book via the [LGA events website](#). The link for each course contains the course programme, pricing and booking link. Bookings are on a first come, first served basis. Each topic is capped at five delegates per organisation over the course of the training programme.

We also accept requests for commissioned training. If you would like us to run training for your authority, or a group of authorities, please email training.lgps@local.gov.uk.

Our survivor benefits, aggregation and insight training courses for 2024 are all currently at capacity. However, there are still places available on:

Employer role training (England and Wales)

- [6 December 2024 – online](#)

If you would like to be placed on the waiting list for any of our courses, email training.lgps@local.gov.uk with details of the course you would like to attend. Please also include how many places you require and the format - online or in person.

Action for administering authorities

Share information about the employer role training with your Scheme employers.
Discuss potential for commissioned training at Pensions Officer Group meetings.

LGPS England & Wales Scheme Advisory Board (SAB)

Update of Funding Strategy Statement guidance

As we reported in [Bulletin 251](#), the SAB has been revising the guidance for funds to follow when reviewing their Funding Strategy Statement (FSS). The SAB convened a working group to look at what new issues needed to be covered, or covered in more depth, in the revised guidance.

This project is close to completion. The revised guidance is nearing the final stages of the approval process. We hope the guidance will be available before the end of the calendar year, following approval by the SAB, the Chartered Institute of Public Finance and Accountancy (CIPFA) and MHCLG.

The Board and the SAB secretariat team want to express their appreciation and thanks for the time and expertise provided by all members of the working group to create the guidance.

October meeting of Pension Committee chairs

Following the meeting held in June 2024 with pension committee chairs, the SAB Chair, Cllr Roger Phillips, will be holding another online meeting on 14 October 2024 at 6pm. It is hoped that the Minister, Jim McMahon, will attend.

The meeting will cover pooling, what might lie ahead for the LGPS following the call for evidence and phase one of the Government's Pension Review and other topical LGPS matters.

Joanne Donnelly emailed pension committee chairs to tell them about the October meeting. Pension committee chairs should email joanne.donnelly@local.gov.uk to be added to the meeting invitation.

Action for administering authorities

Highlight the email about the October meeting with the Chair of your pension committee.

SAB statement and investigation into further opinion on fiduciary duty

SAB has issued a [statement on fiduciary duty and dealing with lobbying](#). The SAB hopes that the statement will help administering authorities:

- deal with the increasing levels of interest in how LGPS funds are invested
- manage discussions with stakeholders and at board and committee meetings.

The SAB Secretariat is seeking an opinion from Counsel as to whether there is a need to update the [previous advice received on the nature of fiduciary duty](#) for administering authorities. Further information will be published when the opinion is received.

The SAB Secretariat is aware of a letter sent to administering authorities on behalf of the Palestine Solidarity Campaign. The Board is seeking legal advice on the contents but cannot guarantee when this will be available. Administering authorities which have received the letter should seek their own legal advice in relation to their specific circumstances and investments. The SAB will publish the legal advice once they have received it. We hope this will be in early October.

Job Opportunity – Pensions Policy and Support Officer

The Board Secretariat Team is recruiting a new member of staff. The role of the [Pensions Policy and Support Officer](#) will be to scope out a new peer support offer for LGPS administering authorities. The successful candidate will carry out project scoping work, which is likely to include:

- speaking to LGPS administering authorities
- developing pilots to show proof of concept, and
- helping to design a new peer support model.

They will then contribute to the co-ordination and delivery of this new offer. The work will require a range of skills including project planning, policy development and supporting delivery of a valuable service to the LGPS community. The role will also include helping to improve the Board's digital communication and social media presence. The closing date is 5pm on 11 October 2024. #LGPSjobs

Reminder – submit your fund annual report for 2023/24

The SAB publishes fund annual reports on its website and uses the data in them to compile the Scheme Annual Report. Administering authorities should send completed reports for 2023/24 to sabsecretariat@local.gov.uk – these can be draft or final reports.

SAB website

[The SAB website](#) provides information about its work. Use the links below to find out more about:

- [a summary of the last Board meeting](#)
- [latest news](#)
- [SAB meeting and agenda papers](#)
- [committee meetings and agenda papers](#)
- [Responsible Investment Advisory Group meetings and agenda papers.](#)

HMRC

Pension schemes newsletter 162

HMRC published [Pension schemes newsletter 162](#) on 17 September 2024. The newsletter includes articles on:

- **Lifetime allowance abolition:** following the informal consultation conducted in August, new regulations will be introduced 'as soon as parliamentary time allows'.
- **Lump sum reporting workshop:** will be held in October. Contact ltaadministration@hmrc.gov.uk, using 'Lifetime allowance (LTA) lump sum reporting workshop' as the subject of your email if you would like to be involved.

- **LTA protections look-up service:** will allow administrators to use the Managing pension schemes service to check that protection a member is relying on for a higher lump sum is valid. Contact pensionsuserresearchrecruitment@hmrc.gov.uk for more information about taking part in research and development of this feature.
- **Managing pension schemes service:** how to enrol and migrate your scheme to the service, system downtime for routine updates from 4pm 11 October to 10am 15 October 2024.

Public service pensions remedy newsletter

On 19 September 2024, HMRC published the [September 2024 Public service pensions remedy newsletter](#). The newsletter covers:

- **Calculate your public service pension adjustment service**
 - the service is now available following a temporary closure
 - HMRC has introduced a ‘triage’ service to help members decide whether they need to use the service
 - members who sign in using their Government Gateway username and password can ‘save and return’ to their submission, but must complete it within nine months
 - members will no longer be asked for their original pension input amounts for the years 2015/16 to 2021/22
 - a new process for members affected by the tapered annual allowance and for cases where a tax charge paid by the scheme decreases because of the remedy
 - members can use the service to declare an annual allowance tax charge rather than having to declare it on their self-assessment return.
- **Reporting interest as savings income:** HMRC has published [guidance on interest paid to members relating to the remedy](#), including the requirement for members to report and pay tax on certain payments.
- **Reclaiming unauthorised payments charges:** which applies to unfunded pension schemes where the member received a lump sum that exceeded the maximum limit to be paid tax-free.
- **Contact and feedback:** Contact publicservicepensionsremedy@hmrc.gov.uk if you have any queries about the remedy and tax, or to volunteer to help with development.

TPO

Blog on expedited decision-making

The Pensions Ombudsman (TPO), Dominic Harris, published a [blog on expedited decision-making](#) on 25 September 2024. The blog provides an update on TPO's operating model review. We covered the review in [Bulletin 251](#).

As part of the review, TPO will extend the use of short-form decisions and determinations ('expedited decision-making') to resolve complaints at earlier stages. The blog includes more information on expedited decision-making and updates on pilots run over the summer. It also confirms that TPO fully rolled out expedited decision-making in September 2024.

As TPO will not publish expedited determinations, it is exploring ways to share any industry-wide learnings, such as through case studies or broader insight products.

Wider landscape

Pension Attention campaign 2024

The 'Pension Attention' campaign for 2024 was launched on 6 September 2024. The campaign, now in its third year, aims to encourage adults to prioritise their retirement savings. This year, TV star Gemma Collins features in a new parody beauty advertisement. The campaign is coordinated by the Association of British Insurers and the Pensions and Lifetime Savings Association (PLSA).

For more details, see the [PLSA press release](#) or visit www.pensionattention.co.uk.

Legislation

Northern Ireland Statutory Instruments

[LGPS \(Amendment\) Regulations \(Northern Ireland\) 2024](#) [SR 2024/159]

Useful links

[LGPS member website \(England and Wales\)](#)

[LGPS member website \(Scotland\)](#)

[LGPS Advisory Board website \(England and Wales\)](#)

[LGPS Advisory Board website \(Scotland\)](#)

[LGPS Regulations and Guidance website \(England and Wales\)](#)

[LGPS Regulations and Guidance website \(Scotland\)](#)

[Current LGPS job vacancies](#)

[Public Sector Transfer Club](#)

[Recognised Overseas Pension Schemes](#) that have told HMRC that they meet the conditions to be a ROPS and have asked to be included on the list.

LGPS pensions section

Raising a query

If you have a technical query, please email query.lgps@local.gov.uk and one of the team's LGPS pension advisers will get back to you. To avoid delays in receiving a response, please do not email advisers directly.

Team contacts

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Further information

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