

Bulletin No.	Action	Completed Date
18	Comms exercise regarding survivors pensions. Initial review by XPS indicates that CFRS are likely to have no impacted members.	Awaiting comms guidance from LGA
12	Complete ABS survey	14/11/2018
13	Ensure any under/overpayment of GMP is corrected. Deficits need to be paid by 21st May.	10/06/2019 - scheme in surplus. Cheque received w/c 10/06/2019
14	Provide LGA with update on scheme reconciliation exercise	31/12/2018
14	Draft and publish employee communications regarding the changes to commutation factors	31/10/2018
14	Complete Administration benchmarking survey	14/01/2019
14	Complete TPR Governance and Administration Survey	30/11/2018
14	Provide purchase order for Scheme Levy	Already provided earlier in Jill Swift
14	Provide comms to members regarding The Police and Firefighters' Pension (Amendment) Regulations 2018 (Split pensions and same sex marriage)	24/04/2019
15	Pension Board Chairs and Scheme Managers, please ensure you liaise with your pension manager to ensure that the updated Added Years/Added Pension and CPD, Tax charge debits and Non-Club Transfer-In ("TV-in") factors are applied with immediate effect.	11/01/2019 & 25/01/2019
15	SAB request for information regarding reasons for opt outs and difficulties surrounding recruitment and retention of talented and experienced personnel due to potential tax consequences of breaching the annual allowance	31/01/2019
15	Ensure TPR annual returns are submitted for all 3 schemes by XPS by deadline of 5 th November	04/11/2018
15	Draft and publish comms to members regarding the Age Discrimination case	28/12/2018
16	Ensure XPS are aware of the changes to Early/Late retirement factors and CETV and divorce factors	28/12/2018
16	Ensure XPS are aware of new added years/added pension/CPD, tax charge debit and non-club transfer factors	04/02/2019
17	Release Member Survey – deadline 28 th Feb	04/02/2019
17	Ensure XPS are aware of new trivial commutation factors	25/02/2019
17	Draft and publish member comms regarding the cost cap mechanism being paused and confirmation of employee and employer contribution rates for 2019/20	12/03/2019
17	Ensure Kier are aware of updated Club Transfer Memorandum and new Club Transfer factors	01/04/2019

17	Provide XPS with written authority to act as administrators with regards to GMP scheme reconciliation in order to request data from HRMC	22/02/2019
18	Notify XPS of new Pension Debit Adjustment and Pension Credit factors	29/03/2019
18	Publish APB guidance on the intranet and ensure it is referenced in temp promotion and temp allowance letters	29/03/2019
19	Add factsheet about Split pensions to the intranet	19/06/2019
19	Add factsheet about Annual Allowance to the intranet	19/06/2019
20	Publish LTA factsheet on the intranet	19/06/2019
20	Complete Training Survey	19/06/2019
20	Publish disclosure information in the green bulletin by 1st July 2019	24/06/2019
20	Review pensionable pay matrix following Booth v Mid and West Wales case	Completed 08/10/2019 JS/JN
21	Ensure XPS have new Transfer in Factors	01/07/2019
21	Release comms to staff about the outcome of the McCloud appeal application	Completed 03/09/2019 JS
23	Notify LGA of key contact for HMRC	Completed 06/10/2019 JS
24	Notify HR of changes to Medical Board of Referees	Completed 06/11/2019 JS
24	Update LGA of change of key contact for HMRC	Updated 06/11/2019 JS
25	Communicate non-club transfer in factors to XPS	Completed 06/11/2019 JS
25	Send amended date requirements to Graeme Hall	Completed 06/11/2019 JS
25	Send GAD pension accounting disclosure and forecasting guidance to Jerry Faulkner	Completed 06/11/2019 JS