

administration services

Rowanmoor Pensions can help scheme trustees find a specialist administrator with the technology and expertise necessary to provide the administration and scheme communications they require. Criteria for selection include:

- administration systems can be programmed to reflect the scheme basis;
- experience in the conversion and transition of existing scheme data;
- active maintenance of member records, including ex-members;
- annual benefit statements, including statutory illustration of money purchase benefits and additional voluntary contributions (AVCs) provided;
- standard forms and letters amended to client's requirements;
- contributions to and units in money purchase accounts (including AVCs) are fully reconciled each month;
- the trustee bank account is actively managed on behalf of the trustees;
- the content and structure of administration reports can be specified by the client;
- the calculation of entitlements and Her Majesty's Revenue and Customs (HMRC) limits on retirement, death or leaving service, plus completion of all relevant letters and forms, calculation of tax and other statutory deductions on refunds of contributions;
- flexibility to amend benefit structures;
- provision and reporting for the operation and maintenance of associated risk insurance policies and market testing and to auditors, actuaries and investment managers;
- annual returns to the Pension Schemes Registry and Data Protection Registrar completed and submitted.



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Rowanmoor Pensions

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