



Punter Southall
PENSIONS ADMINISTRATION



It's all about the members



High quality pensions administration

Services we provide:

- Pension scheme administration
- Trustee training
- Secretarial services
- Pension fund accounting
- Treasury and cashiering
- BACS-accredited Pensioner Payroll Service
- Data audit services
- Specialist training for in-house administrators
- Technical summary for administrators
- Member helplines and online services

63% of our administration staff are qualified, or studying for a professional qualification.

People

We view pensions administration as a people process which is supported by technology and we have created a culture in which our staff can develop and thrive. The Punter Southall approach is to actively encourage our administrators to study for professional qualifications.



"The culture within pension administration has shifted markedly towards, and achievement of, outcomes for clients."

2009 Investors in People assessor



Client focused

We have a client-centric organisational structure in which administrators are responsible for all aspects of the service to be provided to a scheme. We do not support the creation of call centres for bulk processing, or the off-shoring of any of our services.

We take full responsibility for getting the administration right and provide solutions designed to meet our clients' needs. We aim to ensure that over 90% of administration tasks are completed within service level agreement targets and we consistently exceed this.

Our most recent AAF 01/06 external audit tested all of our controls with no exceptions found.

Over 2,000 members have now given feedback and 97% say that our paper work is easy to understand and our people are helpful.

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“Clients see the firm as professional and friendly and many also recognise strengths in relation to the firm’s understanding of its clients’ cultures, needs and objectives.”

Clive Brand, Brand Research

Quality control

Members expect things to be ‘right first time’ as part of a high quality service. Our core proposition is to provide the highest quality and most accurate service possible. We do this by ensuring that our administration teams are highly trained and follow well documented procedures, and that they demonstrate the core values of our quality driven culture at all times. We follow a ‘right first time’ approach to our administration in all that we do.

Putting members first

We place considerable importance on old fashioned courtesy and believe that customer care training (which emphasises the importance of clear verbal communication) is just as important as technical training for administrators.

Our Retirement letters carry the Plain English Campaign’s Crystal Mark which is a rare achievement amongst third party administrators.

We measure member satisfaction through questionnaires sent to members at the end of key events.

Investing in new technology

To deliver efficiencies to our clients and to reduce the risks of manual processing we invest a significant amount each year in the maintenance and development of new technology.

Our administrators are supported by industry leading technology, including the PenScope administration system (developed by us and now owned and maintained by ITM Ltd), IBM FileNet P8, Altus straight-through-processing, CashFac, and Sage Payroll and Accounts.

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Get in touch

To find out more about our administration services, please contact Gillian Graham:



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For further information, visit our website at www.puntersouthall.com

ACQGLOBAL
AWARDS 2011

Actuarial Advisory Firm
of the Year – UK & Ireland
Punter Southall

ACQGLOBAL
AWARDS 2010

Actuarial Advisory – UK
Punter Southall

ACQGLOBAL
AWARDS 2010

Pensions and Actuarial Due Diligence
Provider of the Year – UK
Punter Southall Transaction Services



 **INVESTORS
IN PEOPLE**