

CONSULTANCY SOLUTIONS

We're a team of independent data consultants with specialist pensions and wider financial services knowledge. We've worked with DB and DC pension schemes in the public and private sectors. Helping them harness the power of data to achieve their strategic goals.



WHAT WE DO

We audit, cleanse and manage your data. Meaning your data can help drive you forward, rather than hold you back.

REDUCE RISK



- Accurate calculations of liabilities aiding both valuations and investment strategy
- Identification and correction of incorrect benefit calculations
- Rationalisation of systems and data flows to reduce operational risk

IMPROVE MEMBER EXPERIENCE



- Moving to digital channels through data and systems improvement
- Facilitating member requests for projections with greater speed and accuracy
- Being dashboard ready with clean and enriched data

MEET LEGAL REQUIREMENTS



- Comply with record-keeping, data security, fraud prevention and GDPR regulations
- Deliver legal rulings such as GMP equalisation and McCloud
- Demonstrate good governance and processes

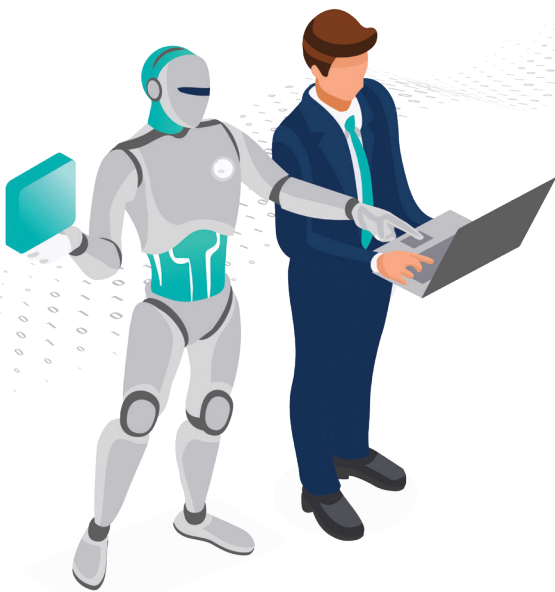
CREATE EFFICIENCIES



- Operational efficiencies created through improved processes and accurate data
- System rationalisation allows legacy systems to be retired
- Digitalisation of communications reduces costs and increases speed, accuracy and insight

Top requests for our consultants right now:

- **Compliance with The Pensions Regulator's guidance on record-keeping** – the focus on data has never been greater. All schemes must review their data for accuracy and put in place a data improvement plan if it does not meet the required standards.
- **Complex de-risking exercises** – such as buy ins/buy outs, Pension Increase Exchange (PIE), longevity swap and trivial commutation – where the quality of data plays a pivotal role in determining positive financial outcomes.
- **GMP reconciliation and equalisation** – reconciliation of both the scheme membership and the level of GMP entitlement for each member is essential before benefits can be correctly equalised to avoid the miscalculation of member fund values and ongoing administration repercussions.
- **Pensions Dashboard** – helping clients realise the value of accurate data as they consider how they might approach the Pensions Dashboard.
- **Review of current administration strategies** – to drive efficient operating models through SLAs, contract and operational processes, mitigation of administration risks, system strategies and functionality reviews.
- **Platform and data migration projects** – decommissioning of legacy, under-utilised systems and migrations to digital platforms.



We bring insider knowledge and outsider independence

We take a client centric approach – and help you create value through the power of data. Our consultants get to know you, your business and your needs through careful analysis, finding out:

- What you have
- Where you hold it
- How you organise it
- Why you use it

Then we make it better.

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Solution delivered...

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