

Pension Fusion

Our pensions dashboards-specific readiness assessment

To meet the Pensions Dashboards Programme's staging dates, now is the time to prepare and make sure all the required data is in a good, compliant order.

WHAT NEEDS TO BE DONE?

Over the next year, you need to start preparing and implementing data strategies to meet the Pensions Dashboards Programme's staging dates



Compliance

Making sure you hold the required data for all members



Accuracy

Providing accurate data for find and view requests



Matching

Plan your match made and possible matching policies

THE PENSIONS REGULATOR

By choosing our 'Core + Advanced' offering you'll be compliant with TPR's checklist on *'Matching savers to their pensions'*

STAGING DATES

Spring 2023

Wave 1, Cohort 1: Master trusts and FCA regulated providers of personal pensions

During 2023

Wave 1, Cohort 2: DC schemes used for automatic enrolment

2023/2024

Wave 1, Cohort 3: All remaining occupational schemes with 1000+ members

After wave 1

Wave 2: Medium schemes (100 to 999 members)

After wave 2

Wave 1, Cohort 3: All remaining occupational schemes with 1000+ members

ITM'S DATA AND IMPLEMENTATION READINESS REPORT



Advices on the steps you need to take



Thoroughly reviews all required data




















Core and Advanced offerings to suit your needs



Ensures compliance with regulations

LATEST: ITM announce critical industry research to help schemes with match criteria

	CORE Data and implementation readiness	ADVANCED Matching data verification and enrichment
Scope of benefit entitlements including AVCs and others		
Pension value challenges, e.g. current calculations and recording of values		
Dashboards data quality analysis		
Match policy recommendations		
Options for transferring data to an ISP by API or SFTP		
Implementation plan and timeline, including risk assessment		
Data cleanse proposal		
Enhanced data cleanse proposal and match policy recommendations		
Verification and enhancement of matching data using tracing sources		
Provision of data that has been verified and enriched as a result		

AN EXPERT ASSESSMENT

ITM provides an in-depth report detailing actions required by your pensions administrator.

- Achieving your scheme's compliance with PDP regulations
- Providing scheme-specific matching policy recommendations based on your data quality

OUR ADVANCED SOLUTION

If you choose the advanced solution, the matching data is corroborated against external data sources and enhanced where newer data is found.

This prepares you for the dashboards and enables us to assess more accurately the expected performance of your matching policy. The results are reflected in the report and updated data returned to you or your administrator.

TALK TO US

enquiries@altus.co.uk | info@itm.co.uk

01225 438 000 | 020 7648 9990

www.pensionfusion.com

Pension Fusion is a registered trade mark of ITM Limited

Altus
An  equisoft company

itm
Solution delivered...