

Annex 2

Subcategory	Complete at End of Period	# Completed Within Customer Target	% Complete Within Customer Target	# Completed Within Legal Response Time	% Complete Within Legal Target
Grand Total	7,539	7,000	92.9%	7,471	99.1%
B1: Communication issued with acknowledgement of death of member	194	170	87.6%	194	100.0%
B2: Communication issued confirming death benefits payable	157	157	100.0%	157	100.0%
B2: Communication issued confirming death benefits payable (frozen refund)	3	3	100.0%	3	100.0%
B2: Communication issued confirming payment of death grant	33	33	100.0%	33	100.0%
B3: Communication issued to deferred member confirming retirement benefits (actual)	325	303	93.2%	320	98.5%
B3: Communication issued to deferred member confirming retirement benefits (quotation)	195	195	100.0%	195	100.0%
B3: Payment of lump sum (both actives and deferreds)	317	315	99.4%	317	100.0%
B4: Communication issued to active member confirming retirement benefits (actual)	351	316	90.0%	337	96.0%
B4: Communication issued to active member confirming retirement benefits (quotation)	27	27	100.0%	27	100.0%
B4: Communication issued to confirm recalculated benefits (actual)	26	13	50.0%	26	100.0%
B5: Communication issued with deferred benefit options	494	395	80.0%	449	90.9%
B5: Communication issued with frozen refund options	569	542	95.3%	565	99.3%
B5: Communication issued with recalculated deferred benefit options	56	42	75.0%	56	100.0%
B5: Communication issued with recalculated frozen refund options	5	5	100.0%	5	100.0%
B6: Communication issued to scheme member providing quotation of interfund in	94	88	93.6%	94	100.0%
B6: Communication issued to scheme member with completion of interfund in	100	94	94.0%	100	100.0%
B7: Communication issued to scheme member with completion of interfund out	90	87	96.7%	90	100.0%
B7: Communication issued to scheme member providing quotation of interfund out	154	150	97.4%	154	100.0%
B8: Payment of refund	189	188	99.5%	189	100.0%
B9: Divorce quotation	74	74	100.0%	74	100.0%
B10: Communication issued following actual divorce proceedings (Pension Sharing Order)	0	0		0	
B11: Member estimates requested by scheme member and employer	125	122	97.6%	125	100.0%
B12: Communication issued to new starters	1,046	1,046	100.0%	1,046	100.0%
B13: Communication issued to member who has rejoined the scheme (Actual)	285	279	97.9%	285	100.0%
B13: Communication issued to member who has rejoined the scheme (Quote)	53	53	100.0%	53	100.0%
B14: Transfers in (including club transfers) Actual	15	15	100.0%	15	100.0%
B14: Transfers in (including club transfers) Quotation	27	27	100.0%	27	100.0%
B15: Transfers out (including club transfers) Actual	18	18	100.0%	18	100.0%
B15: Transfers out (including club transfers) Quotation	128	125	97.7%	128	100.0%
B16: Communication issued to members to confirm set up of additional contributions	34	34	100.0%	34	100.0%
B17: Trivial commutation paperwork issued to member (payment)	9	7	77.8%	9	100.0%
B17: Trivial commutation paperwork issued to member (quotation)	11	9	81.8%	11	100.0%
B18: Communication issued with concurrent merge options	116	66	56.9%	116	100.0%
B19: Communication with member and provider for additional voluntary contributions	21	18	85.7%	21	100.0%
B20: Pension enquiry received from customer (member, 3rd party)	1,779	1,566	88.0%	1,779	100.0%
B21: Updating member's personal details	265	264	99.6%	265	100.0%
B22: Communication sent to members chasing decision on frozen refund	58	58	100.0%	58	100.0%

B22: Initial request issued to previous LG fund for interfund information

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100.0%

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100.0%