

Trustee secretarial service.

We have a dedicated trustee secretarial team which can provide you with a complete package of secretarial services to help the business of your trustee board to run as efficiently as possible.

Benefits to you

Choose any of our services from our flexible menu

Bespoke training for your pensions secretary

Provide additional support to your pensions secretary

Provide trustee training

Menu of services

Choose any of the services from the menus below

Training

- ⑤ Provide bespoke training for your pensions secretary tailored around their individual needs and expertise
- ⑤ Provide additional support to your pensions secretary and work with them to provide as much, or as little, support as required
- ⑤ Organise and/or provide training for your scheme trustees to suit individual requirements

Trustee Meetings

- ⑤ Arranging trustee meetings
- ⑤ Preparing and circulating agenda packs
- ⑤ Co-ordinating attendance of third parties
- ⑤ Preparing and circulating meeting minutes

Regulatory Compliance

- ⑤ Ensuring report and accounts are drafted, agreed and filed within statutory deadlines
- ⑤ HMRC and Pensions Regulator reporting
- ⑤ Completion of the annual scheme return to the Pensions Regulator
- ⑤ Plan, organise and maintain record of trustee training
- ⑤ Data protection registration
- ⑤ Compliance with Member Nominated Trustee requirements

Trustee Documentation

- ⑤ Drafting trustees' reports for inclusion in report and accounts
- ⑤ Keeping complete and up to date set of scheme documentation
- ⑤ Safe storage of original scheme documents
- ⑤ Preparation of trustee business plans
- ⑤ Maintaining trustee minute book

Scheme Governance

- ⑤ Handling scheme complaints
- ⑤ Plan and organise trustee self assessment and monitoring of Key Performance Indicators and Trustees' Knowledge and Understanding
- ⑤ Updating the trustee board on relevant developments in pensions law
- ⑤ Assisting with information gathering for death benefit, early retirement and ill health retirement decisions

The Trustee Secretarial Team

Key Contacts

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[For more information please click here](#)