

## Worcestershire Pension Fund Employer Newsletters Subject Index as at March 2024

Worcestershire Pension Fund Employer Newsletters Subject Index	Date
Academy conversions	Sep-20
Accounts (employer) info / FRS / IAS	Jun - Aug 19, Apr 20, Jul 20, Sep 20, Jul –Aug 21, Feb – Mar 22, Jul – Aug 22, Mar 23, Jul 23
Actuarial costs	Jul-21
Actuarial valuation	Feb - Mar 19, Jul 19, Sep 19 - Jan 20, Apr 20, May – Jul 22, Sep 22 – Feb 23
Address tracing	Apr-22
Age 75	Jun-23
Annual allowance (AA)	Dec 19 - Jan 20, Jan 21, Apr 21, Jan 22, Mar 23 - Apr 23
APCs (Additional Pension Contributions)	Apr 19, May 23
APP (assumed pensionable pay)	Sep 20, Oct 22
Automatic enrolment	Mar 20, Feb 21, Aug 21, Apr 22, Feb 23, Aug 23, Oct 23
AVCs (Additional Voluntary Contributions)	Dec 18, May 19, Oct -Nov 19
Backdated pay awards	Apr 22, May 23
Business Plan	Jul-20
Breaches of law policy	Nov-23
Climate Change	Mar - Apr 21, Nov 21
Contribution rates	Mar-Apr 19, Mar – Apr 20, Feb 21, Feb 22, Apr 22, Feb 23, Apr 23, Feb-24
Cost cap	Jul 21, Oct 21
Cost of living	Nov-22
Costs of redundancy / flexible / early retirement	Feb 19, Dec 19, Jun 20, Jul – Aug 21
Covenants	Dec 18, Feb 19, Aug -Sep 19, Jan - Feb 20, May 20, Jan – Feb 21, Mar 22
Data retention	Sep 19, Oct 21
Deferred annual benefit statements	Jun 19, Jun 20, Jun 21, Jun 22, Jun 23
Discretions	Jul 20, Jan 21, Jan 22, Mar-24
Early retirement factors	Jul-23
Emailing us	Dec-21
Employee annual benefit statements	Jun 19, Aug - Sep 19, Jun 20, Aug - Sep 20, Jun 21, Aug – Sep 21, Jun 22, Aug – Sep 22, Aug - Sep 23
Employer forum	Dec 18 - Jan 19, Mar, Apr 19, Feb – Mar 20, Oct – Nov 20, Apr - May 21, Sep - Nov 21, May –Jul 22, Sep 22
Employer support / training	May 19, Oct 19, Apr 22
Employer survey	Jun – Jul 23
Equitable Life AVCs	Nov-19
Estimates	Dec-19
Exit cap	May 19, Jul 19, Aug 20, Oct 20 – Mar 21
Exit credits	Mar 20, Jul 21
Fair Deal	Feb - Mar 19
Flexible retirement	Dec-21

Forms / Excel spreadsheets	Jan 19, Mar-May 19, Jun 19, Oct 19, Dec 19, Feb – Apr 20, Jul 20, Sep 20, Oct 20, Feb 21, Apr 21, Jan 22, Feb 22, Apr 22, May 22, Aug 22, Oct 22, Jan 23, Mar 23 -May 23, Sep 23, Dec 23
FSS (Funding Strategy Statement)	Dec 18 - Feb 19, Jun -Jul 19, Oct 19 – Jan 20, Mar – May 20, Sep 20, Apr - Jul 21, Feb –Apr 22, Dec 22 – Feb 23, Apr 23
Governance Policy Statement	Apr-21
Guide to the LGPS	Feb 19, Jul 19, May 23
HR guide	May 19, Aug 21, May 23
Ill health	Jan 19, Jun 19, Aug 19 Mar – Apr 20, Jul 20, Oct – Dec 20, Jan - Feb 21, Apr 21, Aug 22, Oct 22, Jul 23
Investment pots	Apr - May 20, May 23
Investment Strategy Statement (ISS)	Apr-21
Late retirement factors	Apr 19, Jun – Jul 19, Jul 23
LDI	Nov-22
Legislation	Feb 19, Jan 20, Mar 20, Aug 20, Sep – Nov 20
LGPS Central Limited	Jun - Jul 19
Logo	May-19
Lifetime allowance (LTA)	Dec 19, Nov 20, Apr 21, Apr 23
McCloud	Jul - Aug 19, Dec 19, Mar – Apr 20, Aug –Sep 20, Jun 21, Oct - Nov 21, Feb 22, Apr 22, Oct 22, Feb 23, Oct-23, Nov-23, Dec 23
Member Portal	Feb-24, Mar-24
Mercer billing	May 21, Jul 21
Minimum pension age	Oct 20, Mar 21, Aug 21, Dec 21
Monthly CARE posting	Feb 19, Apr 22, May 22, Apr 23
Nominations	Feb-20
Opt outs	Dec 20, Feb 22
Outsourcing	Jun-21
Pay for term time workers / workers who work varying hours during only certain weeks of the year	Sep-22
Payroll guide	Jul 19, Sep 20 Aug 21, Jul 22, May 23
Payroll providers	Jun-20
Pension Administration Strategy (PAS)	Feb - Apr 19, Jul - Aug 19, Jan-20, Mar – Apr 20, Jan 21, Apr 21, Jan - Apr 22, Feb 23 – Apr 23
Pension Board	Mar-24
Pensions Committee	Mar-24
Pension increase	Dec 18, Nov 19, Mar 20, Nov 20
Pension Savings Statements	Sep 19, Sep 20, Sep 21, Sep 22, Sep 23, Oct 23
Pensioner newsletter	Nov 20, Nov 21, Nov 22, Nov 23
Pensions taxation webinar	Oct-23
Responsible investment	Apr 21, Aug 21, Mar 22

Retirement seminar	Nov 19, Jan 20, Jun 20
Risk Register	Jul-20
Same sex partnerships	Dec 18 - Feb 19
State Pension age	Jan-22
Tax relief	Aug 20, Nov 20, Nov 21
Tax seminar for high earners	Nov-19
Training Sessions	Jan-24, Feb-24
Transfers of staff between our employers / Outsourcing	Sep 20, Jun 21
Videos for members	Dec-19
Year-end (LGPS)	Jan 19, Mar-May 19, Jan - May 20, Jan-21, Mar - May 21, Jan - Apr 22, Jan-23, Mar 23 - Apr 23, Jan-24, Feb-24, Mar-24