

Register of Pension Fund Policy Documents

Policy	Regulation	Importance	How often it should be reviewed	Previous PAB review date	Next date for PAB to review
<u>Actuarial valuation</u>	<u>LGPS Regulations 2013 Regulation 62</u>	Statutory required (must have)	Every 3 years		May 2023
<u>Administering Authority Discretions</u>	<u>LGPS Regulations 2013 Regulation 60</u>	Statutory required (must have)	Every 4 years	Apr 2019	TBC but no later Apr 2023
<u>Pension Administration Strategy</u>	<u>LGPS Regulations 2013 Regulation 59</u>	Highly recommended	Every 2 years	Mar 2019	April 2021
<u>Annual Report</u>	<u>LGPS Regulations 2013 Regulation 57</u>	Statutory required (must have)	Annually	Sep 2019	July 2021
<u>Breaches policy</u>	<u>Pensions Act 2004 Regulation 70</u>	Highly recommended	Every 2 years	Nov 2019	Nov 2021
<u>Communications Policy Strategy</u>	<u>LGPS Regulations 2013 Regulation 61</u>	Statutory required (must have)	Annually	Nov 2020	Nov 2021
<u>Conflict of Interest</u>	<u>Public Service Pension Act 2013 Regulation 5(4) and 5(5)</u>	Highly recommended	Every 3 years		Nov 2021
<u>Funding Strategy Statement</u>	<u>LGPS Regulations 2013 Regulation 58</u>	Statutory required (must have)	Every 3 years	Nov 2020	May 2022
<u>Governance Policy and Compliance Statement</u>	<u>LGPS Regulations 2013 Regulation 55</u>	Statutory required (must have)	Annually	Nov 2018	TBC
<u>IDRP (Internal Dispute Resolution Procedure)</u>	<u>The Pension Regulator & Occupational Pension Schemes (Internal Dispute Resolution Procedures Consequential and Miscellaneous Amendments) Regulations 2008</u>	Highly recommended	Every 3 years		Apr 2021
<u>Investment Strategy Statement</u>	<u>LGPS Regulations (Management and Investment of Funds) 2016</u>	Statutory required (must have)	Every 3 years	Nov 2020	Nov 2023

Policy	Regulation	Importance	How often it should be reviewed	Previous PAB review date	Next date for PAB to review
<u>LGPS Privacy Notice</u>	<u>Data Protection Act 2018 and General Data Protection Regulation (EU) 2016/679</u>	Statutory required (must have)	Every 3 years		Apr 2021
<u>Risk Register</u>	<u>The Pensions Regulator Code of Practice no.14</u>	Highly recommended	Annually and as part of Business Plan		Apr 2021