

Register of Pension Fund Policy Documents

POLICY	Regulation	Importance	How often it should be reviewed	Most recent PAB review date	Next date for PAB to review
Actuarial valuation	LGPS Regulations 2013 Regulation 62	Statutory required	Every 3 years		After 31 March 2023
Administering Authority Discretions	LGPS Regulations 2013 Regulation 60	Statutory required	Every 4 years	Apr 2019	Q1 2023/24
Administration Strategy	LGPS Regulations 2013 Regulation 59	Highly recommended	Every 2 years	Apr 2021	Q1 2023/24
Annual Report	LGPS Regulations 2013 Regulation 57	Statutory required	Annually	Sept 2022	Q2 2023/24
Breaches policy	Pensions Act 2004 Regulation 70	Highly recommended	Every 2 years	Nov 2021	Q3 2023/24
Communications Policy Strategy	LGPS Regulations 2013 Regulation 61	Statutory required	Annually	Nov 2022	Q4 2023/24
Conflict of Interest	Public Service Pension Act 2013 Regulation 5(4) and 5(5)	Highly recommended	Every 3 years	Nov 2021 (Draft)	Q3 2024/25
Funding Strategy Statement	LGPS Regulations 2013 Regulation 58	Statutory required	Every 3 years	Sept 2022	Q2 2025/26
Governance Policy and Compliance Statement	LGPS Regulations 2013 Regulation 55	Statutory required	Every 2 years	May 2022	Q1 2023/24
IDRP (Internal Dispute Resolution Procedure)	The Pension Regulator & Occupational Pension Schemes (Internal Dispute Resolution Procedures Consequential and Miscellaneous Amendments) Regulations 2008	Highly recommended	Every 3 years		Q3 2024/25

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Investment Strategy Statement	LGPS Regulations (Management and Investment of Funds) 2016	Statutory required	Every 3 years	Apr 2021	Q3 2023/24
LGPS Privacy Notice	Data Protection Act 2018 and General Data Protection Regulation (EU) 2016/679	Statutory required	Every 3 years	Apr 2021	Q1 2024/25
Treasury Management Strategy Statement	Treasury Management Code of Practice	Required	Annually	Feb 2022	Q4 2022/23