

## Register of Pension Fund Policy Documents

<b>POLICY</b>	<b>Regulation</b>	<b>Responsibility under Constitution</b>	<b>Importance</b>	<b>How often it should be reviewed</b>	<b>Most recent PAB review date</b>	<b>Next date for PAB to review</b>
<a href="#">Actuarial valuation</a>	<a href="#">LGPS Regulations 2013 Regulation 62</a>	N/A	Statutory required	Every 3 years	May 2023	After 31 March 2026
<a href="#">Administering Authority Discretions</a>	<a href="#">LGPS Regulations 2013 Regulation 60</a>	Pensions Committee	Statutory required	Every 4 years	Apr 2019	Nov 2023
<a href="#">Administration Strategy</a>	<a href="#">LGPS Regulations 2013 Regulation 59</a>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 2 years	Apr 2021	Jul 2024
<a href="#">Annual Report</a>	<a href="#">LGPS Regulations 2013 Regulation 57</a>	Pensions Committee <sup>1</sup>	Statutory required	Annually	July 2023	Q2 2024/25
<a href="#">Breaches policy</a>	<a href="#">Pensions Act 2004 Regulation 70</a>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 2 years	Nov 2021	Q4 2023/24
<a href="#">Business Plan</a>	N/A	Pensions Committee	Highly recommended	Every year	Each meeting	Each meeting

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<sup>1</sup> To consider

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<a href="#">Communications Policy Strategy</a>	<a href="#">LGPS Regulations 2013 Regulation 61</a>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Statutory required	Annually	Nov 2022	Q4 2023/24
<a href="#">Conflict of Interest</a>	<a href="#">Public Service Pension Act 2013 Regulation 5(4) and 5(5)</a>		Highly recommended	Every 3 years	Nov 2021 (Draft)	Q3 2024/25
<a href="#">Funding Strategy Statement</a>	<a href="#">LGPS Regulations 2013 Regulation 58</a>	Pensions Committee	Statutory required	Every 3 years	Sept 2022	Q2 2025/26
<a href="#">Governance Policy and Compliance Statement</a>	<a href="#">LGPS Regulations 2013 Regulation 55</a>	Pensions Committee	Statutory required	Every 2 years	May 2022	Q1 2024/25
<a href="#">IDRP (Internal Dispute Resolution Procedure)</a>	<a href="#">The Pension Regulator &amp; Occupational Pension Schemes (Internal Dispute Resolution Procedures Consequential and Miscellaneous Amendments) Regulations 2008</a>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 3 years		Q4 2023

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<a href="#">Investment Strategy Statement</a>	<a href="#">LGPS Regulations (Management and Investment of Funds) 2016</a>	Pensions Committee	Statutory required	Every 3 years	May 2023	TBD
<a href="#">Privacy Notice</a>	<a href="#">Data Protection Act 2018 and General Data Protection Regulation (EU) 2016/679</a>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Statutory required	Every 3 years	Apr 2021	Q1 2024/25
<a href="#">Treasury Management Strategy Statement</a>	<a href="#">Treasury Management Code of Practice</a>	Pensions Committee	Required	Annually	Feb 2023	Q4 2023/24