

INDEPENDENT TRUSTEE SECRETARIAL SUPPORT

Your scheme.

Your trustee duties.

Your responsibility.

Our service, your peace of mind.

Secretarial expertise to help pension trustees fulfil their duties efficiently, effectively and compliantly



The secretary to the trustees of a pension scheme performs a vital role in the scheme's day-to-day management.

Now, more than ever, trustees require assistance and support to undertake their role.

Increasing legislation, regulation and calls for stronger governance means that the demands being placed on trustees have risen over recent years, drawing focus away from the issues that matter.

To restore the balance, many trustee boards turn to their scheme secretary to provide assistance and support, in a role that has moved on from a simple 'minute-taker' to a full-blown trustee management function.

Not only will a good secretary arrange meetings and papers, they will also maintain registers and logs, manage professional advisers, liaise with the employer and the membership and deal with the regulatory bodies!

What if your secretary is also a trustee? Balancing the two roles during meetings can be difficult. Or maybe an internal pensions manager or HR resource – pressures of work make it hard to fulfil the secretarial function.

This is where we come in.

Our independent professional secretarial services will provide the peace of mind to enable you to focus on what's really important – your members.

- Professional meeting papers & minutes
- Risk registers, logs & planners – review & maintenance
- Process & management reviews
- Subcommittee structure & management
- Conflict of Interest policies – drafting, review & management
- Adviser review & procurement

Welcome to simplicity.

The role of the scheme secretary has evolved. No longer a simple 'minute-taker', your scheme secretary should manage the trustee board, its meetings, its processes, its adviser and their costs.

Does yours?

Trustee management and secretarial made simple.

simplicity pensions – simply different

How we help

Independent, professional scheme secretarial services – taking the burden away from you

Cost-efficient and effective scheme management – freeing up valuable internal resource

Independence allows for objective management and review – of the trustees, of their processes and of their advisers

Clear, jargon-free papers, detailed minutes, action point reporting - delivered quickly, efficiently and simply

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