

Pensions Administration and Management Services

Barnett Waddingham LLP



DC arrangements

Defined Contribution (DC) arrangements occupy an increasing share of pension scheme provision and come in a range of guises from trust based occupational schemes, AVC schemes, unapproved executive arrangements, stakeholder and other contract based schemes.

Barnett Waddingham LLP provides a wide range of DC administration services for employers and trustees.

Core services

Our comprehensive range of DC administration services includes:

- maintenance of member records
- annuity purchase
- monitoring of contribution limits
- processing of contributions
- tax calculation, payment and reporting
- recording investments
- processing lifestyle investment features
- reconciling contracting-out rebates
- annual benefit statements and SMPI production
- contracting-out termination forms
- processing transfers and divorce orders
- investment switching and withdrawals
- pension benefit calculations
- annual report and accounts and audit facilitation
- internet access to records and facilities
- regular administration reports

BWebstream

We have developed our own suite of pensions administration software, BWebstream, to cater for a full range of integrated services, including the Penstream pension administration module.

A key area of our DC administration service is the tracking of contributions. We provide contribution reporting facilities so that clients and members can accurately monitor the progress of contributions. This applies to the full investment cycle from predicting the amount and timing of the next contribution to how it will be invested and ultimately to what units are purchased.

BWebstream provides the flexibility to organise roles by sharing administrative functions via the internet.



BWebstream
intelligent pensions management from
Barnett Waddingham

Special services

In addition to our core services, we offer many other specialist services (see below). These can be provided separately from the core administration or combined as part of the complete package.

- monitoring of third party processes
- trustee secretarial services
- member presentations/communications
- trustee self-assessment tax returns
- dedicated member help-lines
- scheme design
- data cleansing
- investment and annuity purchase advice*

**by separate appointment to satisfy financial services requirements*

Summary

We provide a high standard of professional services to satisfy the needs of all parties.

Whether you are looking for a full DC administration package or specialist services to complement an existing arrangement then Barnett Waddingham can provide the quality service that you can trust.



We can structure our administration functions to best suit your organisation using the expertise distributed throughout our UK offices.

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