

IF YOU WOULD LIKE TO UNDERSTAND HOW
ADEPT PENSION SOLUTIONS COULD SUPPORT YOU,
PLEASE CALL YOUR NORMAL PENSIONS CONTACT OR



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OR VISIT US AT
WWW.SHOOSMITHS.CO.UK/ADEPTPENSION

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www.shoosmiths.co.uk



ADEPT PENSION **SOLUTIONS**

Cost Effective Legal Support for Pension Schemes from Shoosmiths

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At Shoosmiths we recognise that the legal framework in which occupational pension schemes operate is becoming increasingly complex, time consuming and subject to greater regulatory burden.

To assist smaller pension schemes, we have developed several packages to navigate them through the governance maze and to help them meet their legal challenges.

Led by our experienced pensions partners, and having worked with numerous trustee boards, we have developed **Adept Pension Solutions** with a number of components. Using some or all of these, we can develop a support package that works for you.

Whichever of the components you choose, we will offer a fixed price to ensure affordability and certainty within your available budget.

BENEFITS OF USING ADEPT PENSION SOLUTIONS

- **Expertise** – Adept Pension Solutions is partner-led and harnesses the 100 years' plus experience across the Shoosmiths' pensions team
- **Tailored** – to your requirements as Adept allows you to choose the solution(s) that work(s) best for you
- **Price predictability** – we offer a fixed cost for the solution(s) chosen so that you can better manage your budget
- **User-friendly** – at Shoosmiths we believe in plain English, not overly complicating things for the sake of it
- **Reassurance** – of knowing that an experienced law firm has developed a pension scheme governance solution to support your scheme



“Shoosmiths always provide pragmatic and easy to understand advice. They recognise that pension schemes need to operate in a commercial context.”

James Pearson, Executive Chairman of Cullum Detuners Limited

THE ADEPT PENSION SOLUTIONS OFFERING



Adept MOT – designed to highlight potential risk areas we provide a fixed price scheme documentation review to comment on and make recommendations in respect of:

- ✓ Equalisation
- ✓ Indexation of pensions in payment and revaluation
- ✓ Conflicts
- ✓ Pension flexibilities, including non-statutory transfers
- ✓ Data privacy notice
- ✓ Trustee indemnities
- ✓ Trustee composition
- ✓ Governance procedures and policies
- ✓ Scheme booklet wording

Adept MOT can also be tailored to include a benefit specification and/or balance of powers table, which can be particularly useful when preparing for a buy in/buy out, corporate transaction or handover of scheme to new trustees.



Adept Documents – recognising that the governance requirements for pension schemes are increasing, Adept Documents provides you with a full suite of legal documents to help you fulfil your obligations, which can include:

- ✓ Internal dispute resolution procedure
- ✓ Conflicts & bribery policy
- ✓ Umbrella GDPR policy
- ✓ Risk register
- ✓ Member nominated trustee procedure
- ✓ “Standard” trustee minutes – covering all the basics that should be considered
- ✓ Balance of powers table – so that trustees and employers understand their respective rights



Adept Support – designed to provide trustees with ongoing legal advice and assistance, this gives the comfort of knowing that an experienced law firm is supporting you in achieving legal compliance:

- ✓ Review of agenda & minutes – to comment on any legal issues
- ✓ Attendance at trustee meetings – either in person or by telephone, when required
- ✓ Provision of legal updates – to ensure trustees keep up-to-date
- ✓ Deed of appointment & removal
- ✓ Short deed of amendment
- ✓ Advice line – to cover short member and interpretation queries
- ✓ Training – access to our UK-wide training courses on topical legal issues

We are more than happy to discuss your requirements and the type and level of support you may need, and offer a fixed annual fee to provide this support.