

Matthews

- Aggregation Litigation
- Update on amendment regulations drafting
- Resources – Templates etc.
- GAD Q&A – Calculator and manual cases
- Survey



Update on Matthews Aggregation Litigation

Agreement reached on one aspect of litigation

- Relates to Breaks in Service between RDS and WT employment **on or before 6 April 2000**
- Applicable to **Claimants only**
- Full details on agreement shared with Nominated Contacts
- Mechanism for implementation TBC

What about the wider aggregation issue?

- Discussions between parties remain ongoing
- Hearing scheduled for Late 2027/Early 2028

Queries with MHCLG - Recap

Drafting errors identified for some elements of the amendments

- **Additional death grant**
 - Incorrect dates, and
 - Query on formula
- **Missed Pension Lump Sum Grant**
 - Existing modified members who are due a top up out of scope
 - Query on Commutation
- **Survivor's Missed Pension Lump Sum Grant**
 - Query on formula
- **Purchase of Additional Service**
 - Grammar issue, and
 - Incorrect date

Queries with MHCLG – Current status

Positive engagement with MHCLG

- Queries now split into Red, Amber and Green which represent whether they are Resolved or Ongoing

Resolved – What does this mean in practice?

- Clarification has been given and LGA are now comfortable with the regulation
- To be addressed via a Correction Slip – Imminent resolution
- To be addressed via an amendment SI – Timescales TBC

Ongoing – Why are they not resolved?

- Disagreement over legal interpretation (Missed Pension Lump Sum Grant)
- Not fully understood original query

Resources

Designed to support v3 of the calculator



[Calculator templates](#) – now cover conversion and opted out service



[Letter templates](#) – We envisage they will require a small amendment and are actively working on these



[Election form templates](#) – Extra boxes added where required

GAD Q&A



CALCULATOR



MANUAL CASES

Survey

Inform position across the sector – numbers that represent the following:



Can be done now using v3 of the calculator



Require access to v3.1 of the calculator



Manual cases that require a referral to GAD

Any questions



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Thank you for listening!

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