



Government Actuary's  
Department

# Matthews 2 Calculator & Cases

Brian Allan | 28 April 2026

# GAD Update

V3.X  
calculator

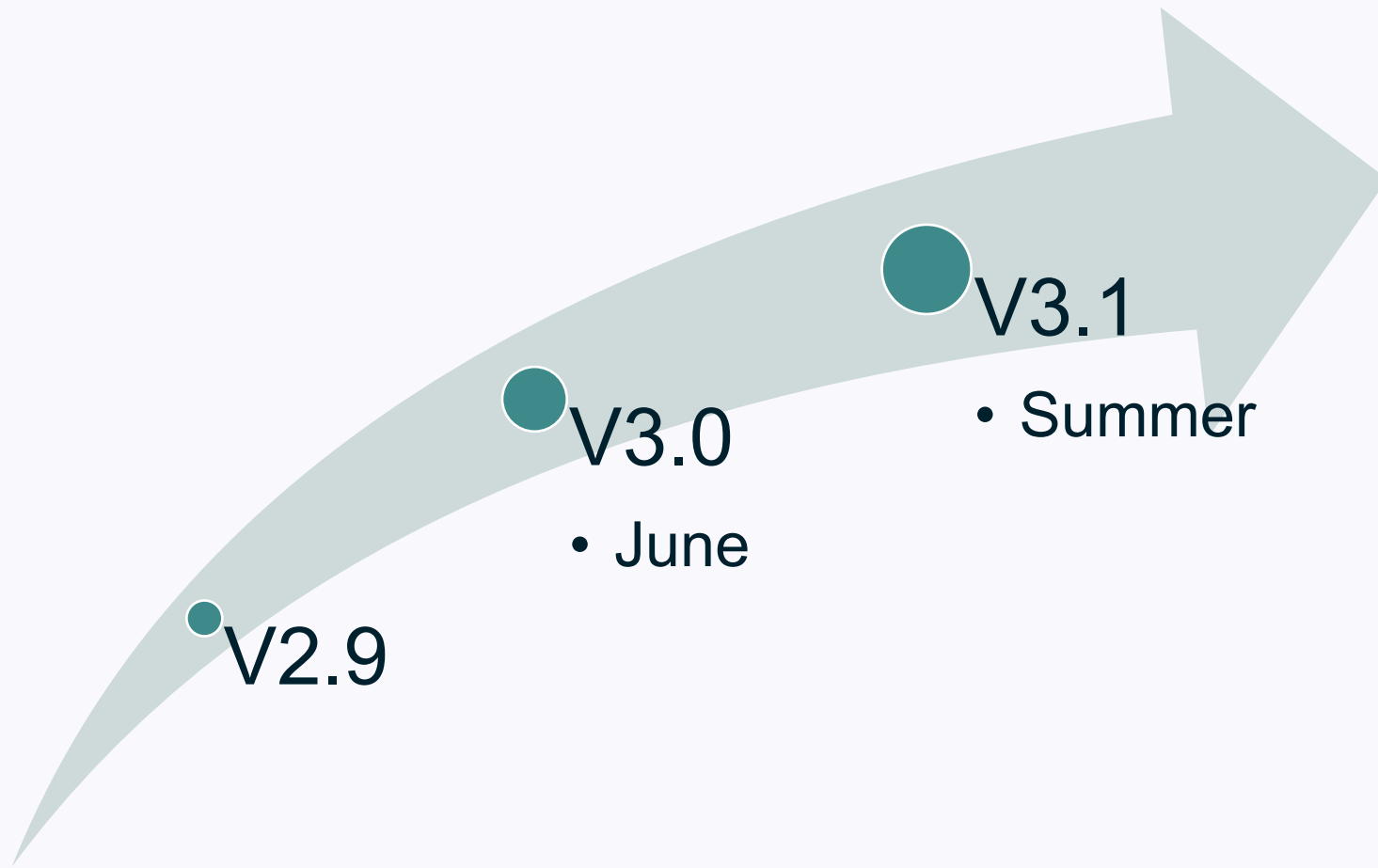
Manual  
cases

# GAD Update

V3.X  
calculator

Manual  
cases

# Forthcoming calculator releases (England only)



# Version 3.0

## Remedy Amendment support

- Standard Scheme Opt-outs (pre-2015)
- Conversion options for deferred members
- Pension back-payments for deceased members (“missed pension lump sum”)
- Extend exercise closing dates

## UX refresh

- Calculator input validation improvements
- User guide format update
- New examples



# Version 3.1

## Candidate fixes and refinements include

- M1 final salary link for pensioners (Planned)
- Extended NI commutation factors (Planned)
- Further input validation improvements
- Separate PI breakdown for back-payments
- Further examples

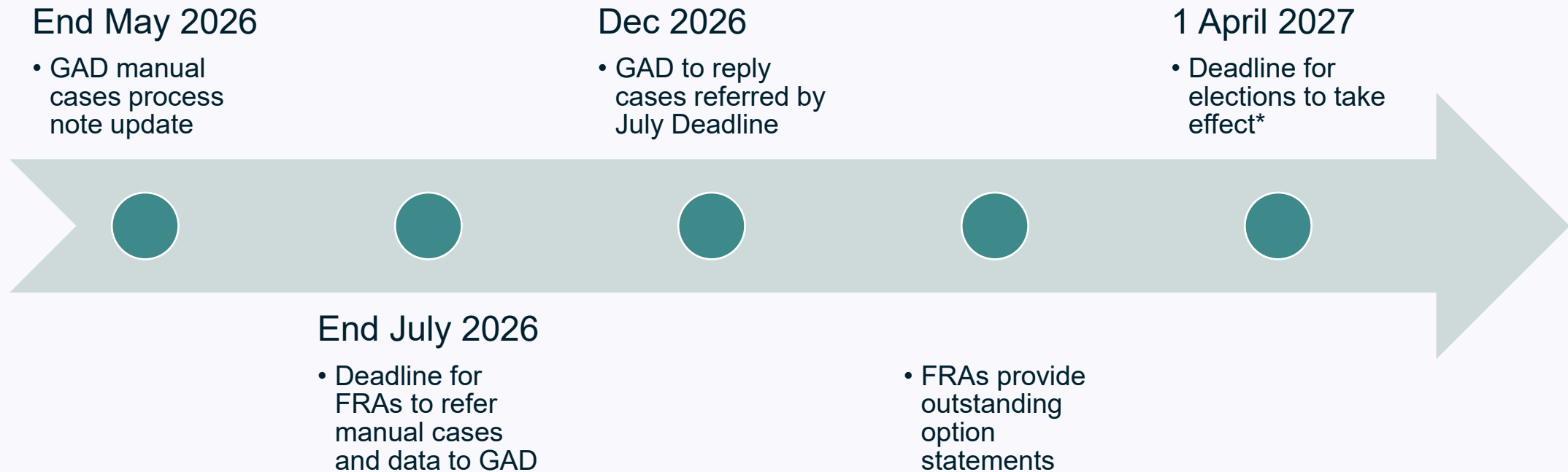
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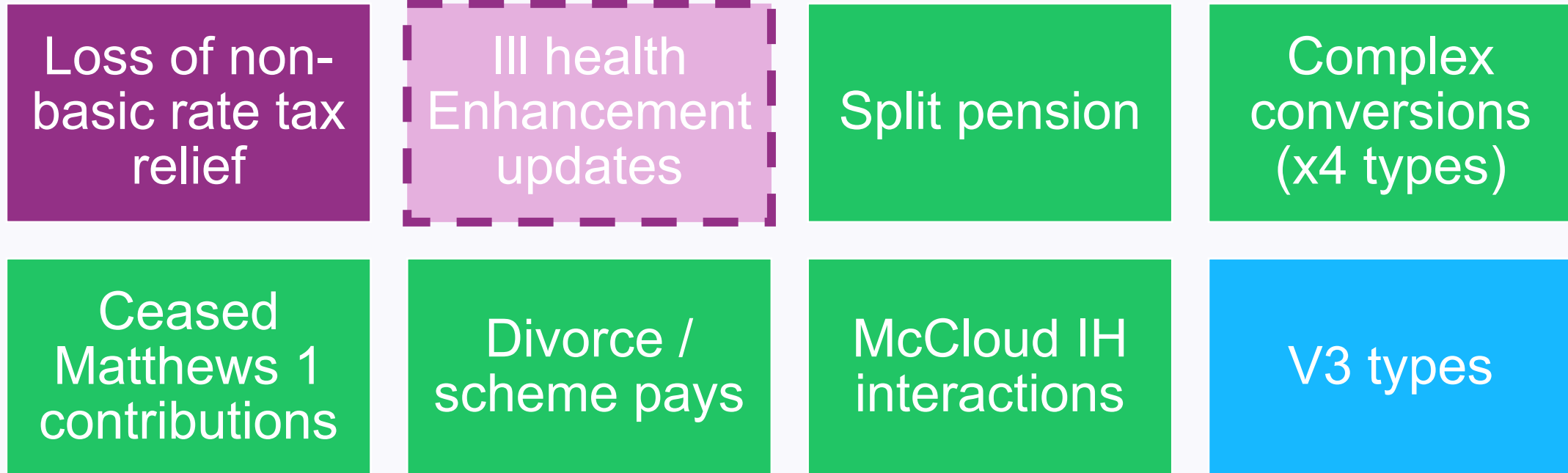


# Manual cases timeline (England only)





# May: manual cases process note update



Data required already published



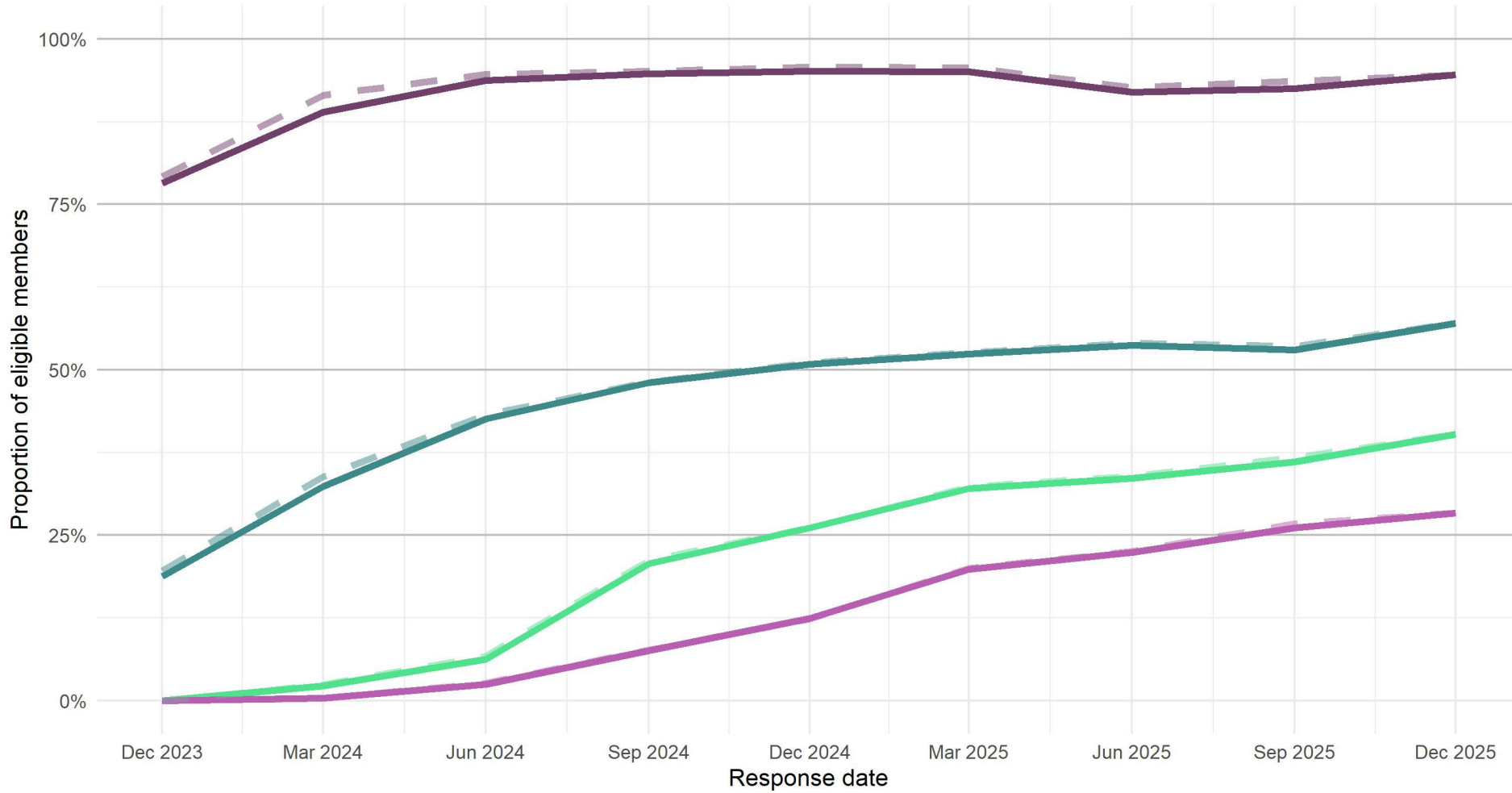
Data required to be added



New manual case types to be added



# Average progress by quarter (England)



Legend — Invited — Interested — Issued — Joined

Solid lines: All data | Dashed lines: FRAs responding in the current quarter only

Stage	No. FF
Eligible	19,500
Invited	18,400
Interested	11,100
Statement sent	7,800
Elected to join	5,500
Passed to admin	5,400
Paid	???



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