

Looking good in insurer triage process

Data

Spouse survey
Spouse pensions
GMP reconciliation
GMP equalisation
Experience data

Benefits

Specification reviewed
and signed off by lawyers
Benefit audit

Governance

Feasibility done
Company and trustee on
board
Joint working party
Independent trustee
Track record – done a
buy-in before

Well planned process

Clear timetable
Price target
Considered any unusual
features

Other

Member option exercises
complete
Clear investment
transition plan
Innovation

Outside your control

Strong brand name
Part of large scheme
Other DB schemes in
group