**Professionalism and Governance**

**Professionalism Assignment 1**

(Recommended Time: 1 hour)

1. **You are a pensions administrator for a large consultancy, working on several schemes but specialising in complaint cases. You have recently issued a response to a member in relation to that member’s complaint about the calculation of his retirement benefits, which he believed to be higher than those quoted. The complaint was not upheld, and the member has called you to discuss your response. During the discussion, the member becomes irate, and is verbally abusive towards you repeatedly.**

**What action do you take?**

**15 marks**

1. **You are a deferred member of a private sector scheme and you have just been appointed to the Trustee Board (Board A) as a member-nominated trustee (MNT). You also serve as an MNT on another Trustee Board (Board B) scheme in relation to another previous employment.**

**Shortly prior to your new MNT appointment, Board A appointed a new third party administration provider (TPA). Through your MNT appointment on Board B, you are aware that a this TPA is under investigation for suspected fraudulent activity in relation to Board B’s scheme, and that the investigation is being treated as highly confidential.**

**What do you do?**

**10 marks**

1. **You are the Client Manager for a scheme’s appointed third-party administration provider. A scheme member has contacted the client’s Pensions Manager to query the transfer value quoted on her recent Benefit Statement, as it is inconsistent with previous Statements. Upon investigation, you discover that the member is one of a group of members who have a protected Normal Retirement Age of 60, and that a recent data cleansing exercise has resulted in these members’ NRA being erroneously amended to age 65.**

**What do you do?**

**15 marks**