



# WRIGLEYS

## — SOLICITORS —

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## CHARITIES AND PENSIONS

### Overview:

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The Wrigleys' pensions team has significant experience supporting charities and other third sector organisations in connection with their pension arrangements, including public sector pension schemes. In particular, we advise clients on the pensions aspects of incorporation, including the transfer of defined benefit pension liabilities from the unincorporated- to the incorporated charity. We help clients to understand their pension obligations in connection with the tendering / retendering of contracts, including those which involve the transfer of staff from the public sector. We also support clients with managing their pension liabilities on the reorganisation and merger of charities. All of these transactions can give rise to significant pensions issues, including the requirement to make substantial debt / exit payments in some circumstances. With the right support and advice, these risks can be managed so please do get in touch with your usual Wrigleys contact if you would like to find out more about how the pensions team can support your organisation.



## Recent Matters

- advising Students Unions on the transfer of pension liabilities under the National Students Union Superannuation Scheme as part of an incorporation process
- advising an Oxbridge college on the transfer of pension liabilities under three defined benefit pension schemes as part of an incorporation process
- advising a charity on the outsourcing of services from the local council, including the transfer of staff from the public sector, the charity's admission to the Local Government Pension Scheme, and the allocation of funding risk through the use of a passthrough agreement

## Public Sector Pensions Expertise

Many of our clients, including charities and education establishments, participate in public sector pension schemes. The Wrigleys pensions team has extensive experience advising across a range of schemes including:

- Local Government Pensions Scheme (LGPS)
- Teachers' Pensions Scheme (TPS)
- NHS Pension Scheme
- Civil Service Pension Scheme
- Firefighters and Police Pension Schemes

In relation to the LGPS, we advise administering authorities, scheme employers (including third-sector bodies) and admitted bodies in connection with a number of different issues unique to the public sector including:

- shared service arrangements
- outsourcing arrangements
- employer discretions
- funding risks including exit debts and credits, and
- New Fair Deal and Best Value Direction queries.

With regards to the TPS, we support educational institutions with queries concerning:

- contribution rates, pensionable pay and member participation rights
- ill-health and early retirement, and
- the use of subsidiary companies to manage pension liabilities

We also advise employers participating in broadly comparable schemes under the 'old' Fair Deal guidance and other quasi-public sector schemes including the Social Housing Pension Scheme.

We work closely with colleagues in our Charities and Social Economy team to provide a seamless service to clients.

## Contact Us

For more information about pensions and charities, please contact a member of our team:



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