Pensions Tax 2018-19

Response for the SAB secretariat, on readiness:

Fire & Rescue Authority:

CFO Name:

In respect of pensions and tax issues, the following is my assessment of the position for 2018 – 2019:

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| --- | --- | --- | --- |
| Topic | Position | Yes / No | Comments |
| General knowledge, understanding and preparedness | My FRA has sufficient material and knowledge and understanding of the position to manage pensions and tax issues in the officer workforce |  |  |
| My FRA would benefit from an SAB-arranged knowledge and understanding briefing for HR, pensions and finance staff similar to those held in 2017. |  |  |
| My FRA would benefit from SAB procured administrator training for my pension team/ officer/ person on the practicalities of calculating tax charges. |  |  |
| Officer Briefings | My FRA intends to hold briefing sessions for officers and will handle this internally |  |  |
| My FRA intends to hold briefing sessions for officers and would welcome SAB involvement in offering briefings, to be funded by the authority |  |  |
| Information | My FRA has sufficient material available to support pensions tax information to officers |  |  |
| My FRA would benefit from SAB/ LGA-provided material to support pensions tax information to officers |  |  |