

How Hymans Robertson uses your personal data

Hymans Robertson provides specialist advice to pension schemes in the UK. If you've been sent a link to this document by the trustees of your pension scheme, please take a few moments to read the information below. It explains how we use your personal data.

About Hymans Robertson

Hymans Robertson is a professional services firm. We specialise in providing actuarial services to trustees of pension schemes, employers and local authorities.

Actuarial services include things like calculating the value of the pension scheme, calculating benefits for scheme members and advising on how much money the pension scheme needs to pay all of the benefits.

For some schemes, one of our qualified actuaries may be personally appointed by the trustees as the scheme actuary. This is a special position under the Pensions Act 1995. Although the scheme actuary works for Hymans Robertson, he or she provides advice independently to the trustees.

Both Hymans Robertson and the scheme actuary (if any) have written agreements with the trustees. We will comply with these agreements and professional standards when using personal data.

Who is the scheme actuary for my pension scheme?

The name of the scheme actuary for your pension scheme (if any) is set out in the scheme's annual report. You can get a copy from the trustees.

Why does Hymans Robertson need my personal data?

We need personal data about the members of the scheme, so that our calculations will be as accurate as possible. Often these calculations depend on the age, sex, earnings, contributions and health of the scheme members.

What personal data does Hymans Robertson need?

We need the following categories of personal data:

- Personal details including name, address, date of birth, sex, marital status and NI number
- Employment and scheme membership details, including length of service, salary, pension contributions and benefits paid
- In some cases, limited health information, for example whether retirement was due to ill health

We try to keep the amount of data we use to the minimum.

Who's accountable for looking after my personal data?

The trustees of the scheme, Hymans Robertson and the scheme actuary (if any) are all accountable.

We all have to make sure that we use your personal data in line with the data protection principles contained in the Data Protection Act 1998.

In practice, the trustees, Hymans Robertson and the scheme actuary (if any) will have varying degrees of day-to-day responsibility. This is because we use your personal data in different ways and at different times.

We've listed the data protection principles here and indicated who is usually responsible.

Principle	The trustees	Hymans Robertson	Scheme actuary (if any)
Principle 1: Personal data is processed fairly and lawfully			
For example, deciding what data is collected and making sure that you're informed about how it's used	●		
Principle 2: Personal data is processed for limited purposes			
For example, making sure that your personal data is used only in ways that are compatible with what you've been told it will be used for	●		
Principle 3: Personal data should be adequate, relevant and not excessive			
For example, making sure that we have just enough personal data to do our jobs properly	●	●	●
Principle 4: Personal data should be accurate and up-to-date			
For example, making sure we don't use out-of-date personal data which might result in mistakes	●		
Principle 5: Personal data shouldn't be kept for longer than necessary			
For example, making sure that data is archived or deleted when it's no longer needed	●		
Principle 6: Personal data is processed in line with your rights			
For example, when you ask for details about what personal data is held about you	●		
Principle 7: Personal data is held securely			
For example, making sure IT systems are secure and staff follow good security practices	●	●	●
Principle 8: Personal data is not transferred to other countries without adequate protections			
For example, where we have to use service providers in countries outside the European Economic Area (the EU and some other countries)	●	●	●

Further information

The Information Commissioner Office's website contains lots of information about data protection.

Visit <https://ico.org.uk/>

Or contact your scheme's trustees. You can usually find out how to contact the trustees through your employer's HR department or by looking at your annual benefit statement or summary funding statement.