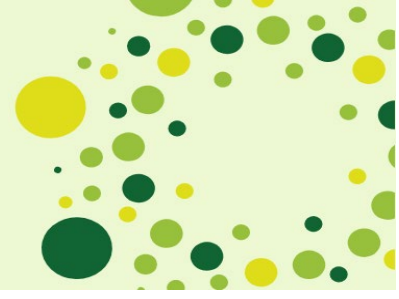




National LGPS **Frameworks**

Legal Services

Specification of requirements



Key

AG- Addleshaw Goddard
AC- Anthony Collins LLP
Brodies- Brodies LLP
Burgess- Burgess Salmon LLP

BP- Burness Paull LLP
C&C- Cleveland & Co
Eversheds- Eversheds LLP
Freeths- Freeths

Gowling- Gowling WLG (UK) LLP
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|---------------------------------|--|---|--------------------------------------|---------------------------|--|-------|-------|-------|
| PART A (INVESTMENT WORK) | | | | | | | | |
| 2.2.1 | Investment fund vehicles (regulated and unregulated), including closed-ended limited partnerships, Open Ended Investment Companies (OEICs), Authorised and Unauthorised Unit Trusts, Undertakings for Collective Investment in Transferable Securities (UCITS), Real Estate Investment Trusts (REITs), listed vehicles, other types of alternative investment funds (AIFs) and with a familiarity of other commonly used European, US and off-shore vehicles and their regulation. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.2 | All forms of corporate and partnership vehicles commonly used in investment fund structures. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling | | | |

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| | | | | | OC PM SPB | | | |
| 2.2.3 | Alternative investment fund establishment for different types of asset classes, including liaising with the Financial Conduct Authority (FCA) in relation to applications for the requisite authorisations/Financial Services and Markets Authority (FSMA) permissions, investor fund-raising/marketing restrictions, preparation of fund launch documentation, setting up tax-efficient investment holding structures, ongoing compliance with UK and international financial services law and regulation (such as AIFMD, UK AIMFD, UK MiFIR, MiFID II and FATCA | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths OC PM SPB | | | |
| 2.2.4 | Advising on Financial Services, Corporate and EU law as it applies to investment funds and investment practice in the UK (including both compliance and transactional aspects) on behalf of | AG Burges Eversheds Freeths OC | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C | | | |

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| | investors or in relation to authorised fund managers/vehicles. | PM SPB | | | Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.5 | Investment management arrangements, agreements, relevant codes of practice and guidelines issued by UK statutory and industry bodies, when acting for an LGPS fund as an institutional investor or the authorised fund manager of an LGPS investment pool or similar structure. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.6 | Advising on commercial property, conveyancing, (to include all forms of documentation relating to acquisitions and disposals and other legal services relating to property management) searches, lease | AG Burges Eversheds OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP Eversheds Gowling | | | |

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| | re-gears, property management and associated/related legal advice. | | | | OC PM SPB | | | |
| 2.2.7 | All forms of corporate & partnership vehicles used in making direct and indirect investments in infrastructure. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.8 | Governance and compliance issues for FCA- authorised vehicles adopting a best practice approach to new regulation (UK MiFIR, MiFID II, SMCR) and perimeter guidance associated with certain investment activities. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC | | | |

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| | | | | | PM SPB | | | |
| 2.2.9 | Advising on company secretarial matters and general corporate governance. | AG Burges Eversheds OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Gowling OC PM SPB | | | |
| 2.2.10 | Any Class actions and other legal advice relating to Class Actions. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |

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| 2.2.11 | Advising on and negotiating documents relating to the purchase of existing private fund interests on the secondary market, with up-to-date knowledge of the latest market practices/norms. | AG Borges Eversheds Freeths OC PM SPB | Brodies Borges Eversheds PM | Borges Eversheds PM | AG Brodies Borges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.12 | Agreements for global custody and sub-custodian services, portfolio transition management, administration, use of derivatives and currency hedging, and other investment services. | AG Borges Eversheds Freeths OC PM SPB | Brodies Borges Eversheds PM | Borges Eversheds PM | AG Brodies Borges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |

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| 2.2.13 | The negotiation of financial legal documents, including ISDA master agreements, commodity agreements, repurchase master agreements, securities lending master agreements and brokerage documentation. | AG Burges Eversheds OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Gowling OC PM SPB | | | |
| 2.2.14 | Advising on cross-border transactions between the UK and other EU jurisdictions, the US, off-shore and in other jurisdictions commonly encountered in investment and other investment management/administration transactions (including the emerging and developing markets). | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |

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| 2.2.15 | Advising on investment governance including the exercise of fiduciary duty by Pension Committees, Environmental, Social and Governance (ESG) considerations, ethical and responsible investment matters, and the application of the Myners Principles, the UK Stewardship Code, the TPR single code of practice and any other codes of best practice | AG Borges Eversheds Freeths OC PM SPB | Brodies Borges Eversheds PM | Borges Eversheds PM | AG Brodies Borges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| 2.2.16 | Providing or co-ordinating specialist tax support and knowledge in the investment funds/ management sector, including advising on UK pension fund taxation and the application of VAT and VAT exemptions. This may require having sufficient in-house expertise or networks to facilitate advice on overseas tax requirements, the availability of exemptions for LGPS investors and routes for recovering overpayments of tax. It could involve reviewing contracts with foreign tax agents | AG Borges Eversheds Freeths OC PM SPB | Brodies Borges Eversheds PM | Borges Eversheds PM | AG Brodies Borges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |

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| | and providing advice on completion of foreign tax returns. | | | | | | | |
| 2.2.17 | Advising on and supporting LGPS funds with existing or potential pooling arrangements for investment services. | Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | | | |
| PART B (BENEFIT ADMINISTRATION, EMPLOYER BODIES AND GOVERNANCE WORK) | | | | | | | | |
| 2.2.18 | Employer admissions (when acting for the LGPS fund itself or a scheme employer), reorganisations, other types of constitutional change, outsourcing arrangements, restructurings and cessations, as well as negotiating payment plans and other risk mitigation strategies aimed at protecting the interests of pension fund stakeholders. This may | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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| | require knowledge of TUPE, 'Fair Deal', Best Value and COSOP rules. | | | | | | | |
| 2.2.19 | Advising on third party benefit administration and service level agreements and pension bulk transfer agreements. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.20 | Drafting and negotiating admission agreements with different types of scheme employer (including Secretary of State applications), guarantees and where appropriate, security packages for unfunded scheme employer contributions or deficits. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.21 | Transposing complex LGPS regulations into member communications to ensure they are both legally accurate to protect the funds from any | AG Burges Eversheds Freeths | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds | Brodies Burges BP Eversheds | Burges Eversheds PM |

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| | liability or reliance risk and user-friendly for fund members to read and understand. | OC PM SPB | | | | Freeths OC PM SPB | PM | |
| 2.2.22 | The protection of accrued pension rights e.g. TUPE situation, Rule of 85 provisions, career breaks and opt-outs, benefit aggregation, early and flexible retirement terms, public sector transfer club rules, private sector transfers, and scope of transitional arrangements. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.23 | The exercise of pension discretions including on making death grants and the establishment of trust arrangements for juveniles or incapacitated beneficiaries. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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| 2.2.24 | Disbursement of pension fund benefits, exercise of delegations and the scope of any related policies and best practice guidance. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.25 | The discharge of unfunded liabilities and payment of pension gratuities. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.26 | Pension issues arising from registered civil partnership and fund member divorce including ear marking and pensions sharing orders. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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| | | | | | | SPB | | |
| 2.2.27 | Complex early pension release transfers and issues regarding pension liberation schemes and potential fraudulent activity. Ability to advise on Pensions Pledge and Pensions Nudge. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.28 | Member complaints in relation to pension benefits, including drafting responses on Stage 1 and Stage 2 IDRPs and Pension Ombudsman cases, and advising funds on future prevention and mitigation measures. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.29 | Recovery of pension fund overpayments and other payments made in error, handling of pension fraud and complex debt recovery cases including litigation and court action (including High Court) if | AG Burges Eversheds Freeths OC | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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| | required and advising on the requirements of the unauthorised payments rules. | PM SPB | | | | OC PM SPB | | |
| 2.2.30 | Administering exit credits and the potential implications for a LGPS funding strategy. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.31 | Delivering pensions knowledge for Pension Committees, Boards and similar bodies, providing training to such bodies and LGPS staff as required, and induction training for new appointees. This will require an understanding of Local Government Governance arrangements as set out in the Local Government Act 1972 and Public Service Pensions Act 2013. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.32 | Internal pension fund governance matters (including compliance obligations, effective risk | AG Burges | Brodies Burges | Burges Eversheds | | AG AC | Brodies Burges | Burges Eversheds |

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| | management and decision-making, sub-delegations, requirements of the good governance project and minimising conflicts of interests). | Eversheds Freeths OC PM SPB | Eversheds PM | PM | | Burges Eversheds Freeths OC PM SPB | BP Eversheds PM | PM |
| 2.2.33 | Advising Pensions Committee, Boards or similar bodies and LGPS staff on all aspect of public and pension fund law, constitutional matters, governance and primary fiduciary duties toward the pension fund and the financial interests of fund members. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.34 | The scope of the fiduciary responsibilities for Pensions Committee, Boards or similar bodies and LGPS staff, and any liability exposure for members of such bodies when acting in this capacity. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.35 | Pension funding obligations and fund deficit recovery and repayment plans from LGPS | AG Burges Eversheds | Brodies Burges Eversheds | Burges Eversheds PM | | AG AC Burges | Brodies Burges BP | Burges Eversheds PM |

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|-----------|--|---|--------------------------------------|---------------------------|-------|---|--|---------------------------|
| | employers. Flexibility regarding exiting employers and payments in instalments – deferred debt or debt spreading arrangements. | Freeths OC PM SPB | PM | | | Eversheds Freeths OC PM SPB | Eversheds PM | |
| 2.2.36 | Advising on trust law where relevant to any LGPS pensions matters. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.37 | The impact of changes in Government policy affecting LGPS funds and scheme employers, including the outcomes from national consultations on pensions reform options. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.38 | Aspects of employment law and HR policies and practices, e.g. human rights legislation, age discrimination, default retirement obligations etc. | AG Burges Eversheds Freeths | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds | Brodies Burges BP Eversheds | Burges Eversheds PM |

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| | | OC PM SPB | | | | Freeths OC PM SPB | PM | |
| 2.2.39 | LGPS obligations with respect to provision of contractually agreed benefit promises, dealing as necessary with DLUHC on potential regulatory amendments. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.40 | Issues arising from the exercise of scheme employer pension discretions, pensions issues arising from statutory redundancy and voluntary early retirement schemes, and ill-health retirement cases. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.41 | Impact of conversions of maintained schools to academies, and other types of scheme employer conversions and how it impacts on funding of pension liabilities. | AG Burges Eversheds Freeths OC | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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|-----------|---|---|--------------------------------------|---------------------------|-------|---|--|---------------------------|
| | | PM SPB | | | | OC PM SPB | | |
| 2.2.42 | Accessing specialist pensions tax matters, including the scope of unauthorised payment rules and any applicable employment tax rules. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.43 | The establishment of or participation in shared service or potential pooling arrangements for pensions administration services. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.44 | Advice on regulatory and compliance matters in connection with The Pensions Regulator, CIPFA and the LGPS Scheme Advisory Board. | AG Burges Eversheds Freeths OC PM | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

Key

AG- Addleshaw Goddard

AC- Anthony Collins LLP

Brodies- Brodies LLP

Burges- Burges Salmon LLP

BP-Burness Paull LLP

C&C- Cleveland & Co

Eversheds- Eversheds LLP

Freeths- Freeths

Gowling- Gowling WLG (UK) LLP

OC- Osborne Clarke LLP

PM-Pinsent Masons LLP

SPB- Squire Patton Boggs

Provider Services Offered-Overall

| Reference | Service area | Lot 1 | Lot 2 | Lot 3 | Lot 4 | Lot 5 | Lot 6 | Lot 7 |
|------------------------------|--|---|--------------------------------------|---------------------------|---|---|--|---------------------------|
| | | SPB | | | | PM SPB | | |
| 2.2.45 | Advising on employment law including but not limited to employment disputes. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| PART C (GENERAL WORK) | | | | | | | | |
| 2.2.46 | Advising on outsourcing and procurement matters. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Burges BP Eversheds Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.47 | Advising on general commercial and trust law issues, including commercial contracts. | AG Burges Eversheds Freeths | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP | AG AC Burges Eversheds | Brodies Burges BP Eversheds | Burges Eversheds PM |

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|-----------|---|---|--------------------------------------|---------------------------|---|---|--|---------------------------|
| | | OC PM SPB | | | C&C Eversheds Gowling OC PM SPB | Freeths OC PM SPB | PM | |
| 2.2.48 | Advising on the body of regulations applicable to LGPS funds. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP Eversheds Freeths Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.49 | Implications of recent Appeal, Supreme and High Court and other case law and Pension Ombudsman's decisions. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Burges BP Eversheds Gowling OC PM | AG AC Burges Eversheds Freeths OC PM | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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|-----------|--|---|--------------------------------------|---------------------------|--|---|--|---------------------------|
| | | | | | SPB | SPB | | |
| 2.2.50 | Advise on post Brexit implications on the LGPS in terms of regulation, funding and the investment environment. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.51 | Dispute resolution. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP Eversheds Freeths Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |

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|-----------|--|---|--------------------------------------|---------------------------|--|---|--|---------------------------|
| 2.2.52 | Instructing and liaising with specialist Counsel where required. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP C&C Eversheds Freeths Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.53 | New pensions law, finance acts, and other possible changes for LGPS funds, consultation exercises, and assessing national and local government policy changes affecting LGPS pension funds and scheme employers. | AG Burges Eversheds Freeths OC PM SPB | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP Eversheds Gowling OC PM SPB | AG AC Burges Eversheds Freeths OC PM SPB | Brodies Burges BP Eversheds PM | Burges Eversheds PM |
| 2.2.54 | General property law advice e.g. charges on assets for funding liabilities | AG Burges Eversheds Freeths | Brodies Burges Eversheds PM | Burges Eversheds PM | AG Brodies Burges BP | AG AC Burges Eversheds | Brodies Burges BP Eversheds | Burges Eversheds PM |

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| | | OC PM SPB | | | Eversheds Gowling OC PM SPB | Freeths OC PM SPB | PM | |

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