

Parker Hannifin Pension & Death Benefit Plan

Internal Disputes Resolution Procedure (“IDRP”)

for members and beneficiaries

Who may make a complaint?

Any person listed below may make a complaint under this IDRP procedure:

- A member of the Plan.
- A widow, widower, surviving civil partner or surviving dependant of a deceased member of the Plan.
- A person who will become eligible to join the Plan in the future.
- A person who has ceased to be in one of the categories above in the six months before the complaint is made.
- A person whose complaint is that they should be treated as being in one of the above categories.

Informal Stage

If you have a complaint about any matter connected with the Plan, either relating to your benefits or the service that you have received, you should in the first instance raise the matter informally by speaking to Janet Ward, Pensions Payroll Officer, in the pensions department at Dukesway, Team Valley. She can be contacted on telephone number 0191 402 9046.

If you do not receive a response within 4 weeks of speaking to Janet (if it is necessary to take longer than 4 weeks you will be advised accordingly) or if you are not satisfied with the response, please move on to IDRP Stage 1.

IDRP Stage 1 - Written Complaint

At this stage you should write, setting out your complaint clearly, to Jane Young, Pensions Manager, who has been appointed to resolve IDRP Stage 1 disputes. Your letter should be directed to Jane at the following address:

Parker Hannifin Pension Trustees Ltd
Suite 2A
Breakspear Park
Breakspear Way
Hemel Hempstead
Herts
HP2 4TZ

Please make sure you include the following details in your letter:

- Full name, address, date of birth, and national insurance number.

- If you are making your complaint as someone connected to a Plan member please include the above items for yourself and for the Plan member. Please state your relationship.
- The full name, address and profession (if any) of any representative acting on your behalf. Please confirm whether you wish for correspondence to be directed to yourself or your representative.
- The facts relating to your disagreement with enough detail to show why you are aggrieved.
- Confirmation that you consent to the processing of your personal data for the purposes of dealing with your complaint.

You will receive a written response within 2 months of the receipt of your letter, although this may be to tell you that your complaint will take longer than this to investigate and resolve fully - if so, you will be told how long it is expected to take.

When you receive the written decision you will be asked to confirm whether or not you accept the response and are satisfied that the matter has been dealt with. If you are not satisfied you have the right to appeal to the trustee directors under Stage 2 of the IDRPs. You will have up to 6 months from the date of the IDRPs Stage 1 decision to appeal and follow the IDRPs Stage 2.

In certain cases, you may be offered the option of moving straight to the second stage of the process, which would mean that your complaint would be referred straight to the trustee directors for consideration. This is likely to be appropriate where, for example, the Pensions Manager or trustee directors have already been involved with informal discussions regarding your complaint or the subject matter has already been dealt with under the IDRPs process for similar complaints from other parties.

IDRP Stage 2 – Appeal

At this stage, you should write to Derek Turnbull, Chairman of the Trustee Directors, c/o Parker Hannifin Pension Trustees Ltd, Suite 2A, Breakspear Park, Breakspear Way, Hemel Hempstead, Herts, HP2 4TZ, stating that you want the matter to be reconsidered and explaining why you are dissatisfied with the earlier decision made.

The trustee directors will then consider your complaint, usually at the next quarterly meeting. You will receive a written response within 3 months of the date on which the Chairman receives your appeal, although this may be to tell you that your complaint will take longer than this to investigate and resolve fully - if so, you will be told how long it is expected to take.

The written decision under IDRPs Stage 2 is final and you cannot ask the trustee directors to reconsider the matter again.

The Pensions Ombudsman

You have the right to refer your complaint to The Pensions Ombudsman free of charge. The Pensions Ombudsman deals with complaints and disputes which concern the administration and/or management of occupational and personal pension schemes. Contact with The Pensions Ombudsman about a complaint needs to be made within three years of when the event(s) you are complaining about happened – or, if later, within three years of when you first knew about it (or ought to have known about it). There is discretion for those time limits to be extended.

The Pensions Ombudsman can be contacted at:

Tel: 0800 917 4487

Email: enquiries@pensions-ombudsman.org.uk

Website: pensions-ombudsman.org.uk

Pension Wise and Money Helper

Pension Wise is a government service set up to help people understand the pension options available to them. It offers guidance to help empower people to make informed decisions about their pension which are best for their individual circumstances. If you have any general requests for information or guidance concerning your pension arrangements, you can contact Pension Wise. The contact details are:

Tel: 0800 011 3797

Website: <https://www.moneyhelper.org.uk/en/pensions-and-retirement/pension-wise>

Data Protection Act 2018 and General Data Protection Regulation

In order to administer the Plan, including for the purposes of considering any dispute under the Internal Dispute Resolution Procedure, the Trustee needs to hold and process information about you and this information may be passed to the Plan's professional advisers and administrators. The information may also be passed to the participating employers in the Plan for employment purposes. At all times your personal information will be held and processed in accordance with the Data Protection Act 2018 and the European General Data Protection Regulation. In particular, we consider that the processing of any special categories of data which is carried out as part of this Internal Dispute Resolution Procedure is necessary in order to establish and defend legal claims and so is permitted under the relevant legislation.

JULY 2024