

Mantle - Support Services Policy

April 2018

This document is the Mantle "Support Services Policy" operated by Pensions Hosting Company (PHC), with effect from 1 April 2018, and referred to within the Mantle Services Agreement between PHC and their Customers. The Policy is available to Customers via the PHC website and may be varied from time to time by PHC, reflecting changing business, operational and technological circumstances. All Customers will be notified of the issue of any amended Policy, and can view this on www.mantlehosting.co.uk or any other website address as may be notified to the Customer from time to time.

Support Services Policy

1. In conjunction with the Mantle Services and if provided for in the Mantle Services Agreement, PHC Customers may use the Financial Statistical Data provided by the following PHC Licensor Parties:
 - * Morningstar, Inc.
 - * FTSE Russell.
 - * Markit Group Limited
 - * Moody's Analytics (economic scenario sets)

Any changes to the Licensor Parties, or the availability of such Financial Statistical Data will be notified to Customers at least 30 days prior to any contractual arrangements between PHC and the Licensor Party taking effect.

2. For a period of 3 months from the date of each Customer Service Agreement, PHC will provide Mantle operational training to pre-agreed named employees of the Customer. This training may include face-to-face training sessions, and no charges will be raised for this training support.
3. Ongoing support via telephone hotline and internet mailbox will be available from 8am to 6pm (UK time) to the agreed named employees at no additional charge.
4. In the event that the Customer seeks bespoke additional support, fixed charges will be pre-agreed for this work.
5. Mantle will make available an internet based error log, visible to all Customers and any changes to this error log will be available to all Customers.
6. All significant changes to the Mantle system will be published at

status.mantlehosting.co.uk.

7. PHC will maintain a statistics library of relevant statutory instruments for use within the Services, with the following statistics available for all Customers:
 - * Lower & Upper Earnings Limits
 - * Basic State Pensions
 - * Post 1988 GMP Increases
 - * Fixed Rate GMP Revaluations
 - * Section 52 Revaluation Orders
 - * UK tax brackets.
 - * Section 148 Revaluation Orders

In additional statutory instruments public available required for the calculation of pension scheme benefits will be added to the system upon request with 14 days.

8. In the event that the Customer requires another actuarial firm to have access to all or part of the Scheme Portfolio, a Supplementary Service Agreement is required to be completed by this other party.
9. PHC value the input of all Customers with regard to additional Mantle functionality and prioritisation of system development, and actively engage with Customers to seek this input.

April 2018