

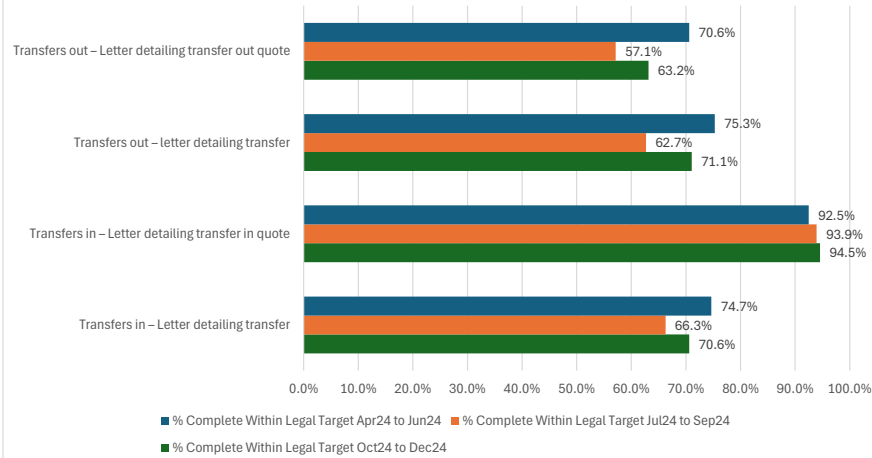
# APPENDIX A

Appendix A KPI table for the period April 2024 to December 2024

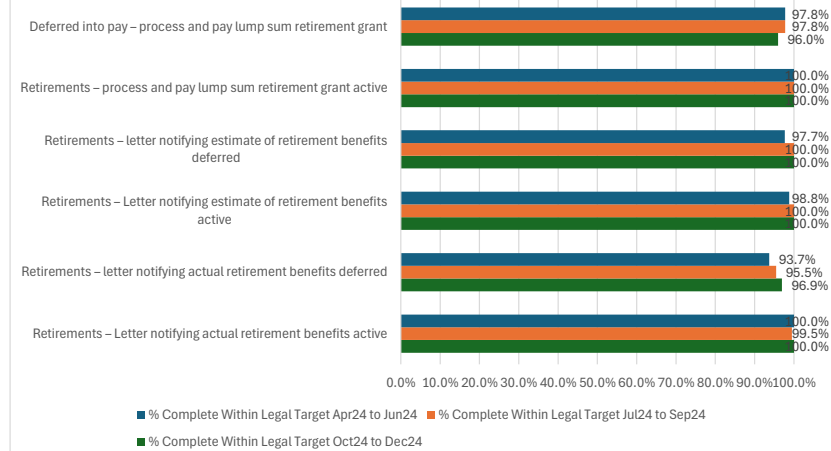
Category	Q1 Complete at End of Period Apr 24 to Jun24	Q2 Complete at End of Period Jul24 to Sep24	Q3 Complete at End of Period Oct24 to Dec24	Q4 Complete at End of Period Jan25 to Mar25	Customer Target	% Complete Within Customer Target Apr24 to Jun24	% Complete Within Customer Target Jul24 to Sep24	% Complete Within Customer Target Oct24 to Dec24	% Complete Within Customer Target Jan25 to Mar25	% Complete Within KPI Target Apr24 to Jun24	% Complete Within KPI Target Jul24 to Sep24	% Complete Within KPI Target Oct24 to Dec24	% Complete Within KPI Target Jan25 to Mar25	Legal target	Q1 Complete Within Legal Target Apr24 to Jun24	Q2 Complete Within Legal Target Jul24 to Sep24	Q3 Complete Within Legal Target Oct24 to Dec24	% Complete Within Legal Target Jan25 to Mar25
Aggregation - Send notification of aggregation options	328	251	302		40 days	95.1%	89.6%	89.1%		95.1%	89.6%	72.6%		2 months	97.0%	94.4%	90.1%	
Deaths – Initial letter acknowledgement death	152	112	127		10 days	58.6%	66.1%	62.2%		58.6%	66.1%	55.5%		2 months	99.3%	97.3%	97.6%	
Deaths – Letter notifying amount of dependant's benefit	75	86	93		15 days	82.7%	81.4%	88.2%		82.7%	81.4%	78.5%		2 months	92.0%	90.7%	95.7%	
Deferment – calculate and notify deferred benefits	518	260	222		30 days	56.8%	65.0%	45.0%		56.8%	65.0%	39.3%		2 months	77.2%	82.3%	70.7%	
Deferred into pay – process and pay lump sum retirement grant	225	181	198		15 days	60.9%	61.9%	48.5%		60.9%	61.9%	53.7%		2 months	97.8%	97.8%	96.0%	
Divorce quote – Letter detailing cash equivalent value and other benefits	27	17	23		15 days	63.0%	94.1%	87.0%		63.0%	94.1%	86.6%		2 months	85.2%	100.0%	100.0%	
Refund – Process and pay a refund	112	82	76		10 days	93.8%	91.5%	93.4%		93.8%	91.5%	97.0%		2 months	99.1%	100.0%	98.7%	
Retirements – Letter notifying actual retirement benefits active	109	200	116		15 days	87.2%	92.0%	91.4%		87.2%	92.0%	93.2%		2 months	100.0%	99.5%	100.0%	
Retirements – letter notifying actual retirement benefits deferred	255	266	196		15 days	31.8%	60.2%	62.8%		31.8%	60.2%	61.2%		2 months	93.7%	95.5%	96.9%	
Retirements – Letter notifying estimate of retirement benefits active	84	76	69		15 days	92.9%	97.4%	88.4%		92.9%	97.4%	93.9%		2 months	98.8%	100.0%	100.0%	
Retirements – letter notifying estimate of retirement benefits deferred	43	37	35		15 days	90.7%	97.3%	85.7%		90.7%	97.3%	91.6%		2 months	97.7%	100.0%	100.0%	
Retirements – process and pay lump sum retirement grant active	134	122	158		15 days	95.5%	98.4%	98.7%		95.5%	98.4%	97.2%		2 months	100.0%	100.0%	100.0%	
Transfers in – Letter detailing transfer	75	89	85		15 days	22.7%	40.4%	41.2%		22.7%	40.4%	50.2%		2 months	74.7%	66.3%	70.6%	
Transfers in – Letter detailing transfer in quote	93	132	110		15 days	59.1%	85.6%	85.5%		59.1%	85.6%	79.1%		2 months	92.5%	93.9%	94.5%	
Transfers out – letter detailing transfer	85	67	76		15 days	56.5%	46.3%	53.9%		56.5%	46.3%	62.3%		2 months	75.3%	62.7%	71.1%	
Transfers out – Letter detailing transfer out quote	34	42	38		15 days	29.4%	19.0%	13.2%		29.4%	19.0%	46.6%		2 months	70.6%	57.1%	63.2%	
Grand Total	2349	2020	1924															

Customer Target set by the Fund  
Legal Target - Disclosure Regulations

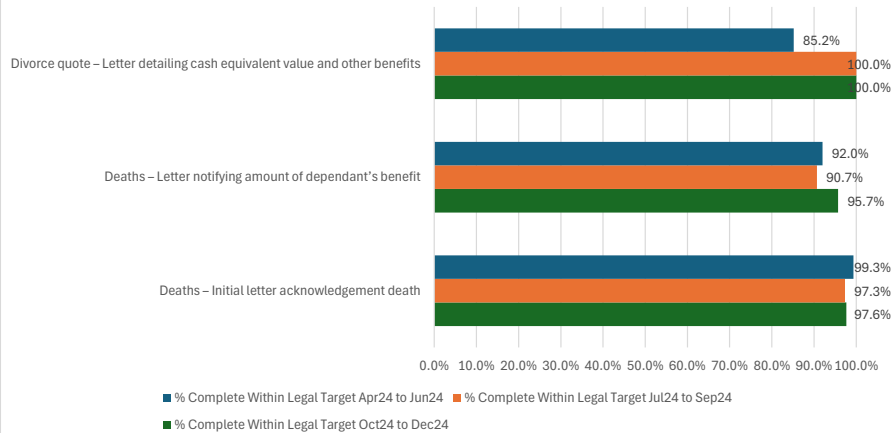
Percentage Complete Within Legal Target  
Transfers



Percentage Complete Within Legal Target  
Retirements



Percentage Complete Within Legal Target  
Deaths & Divorce



Percentage Complete Within Legal Target  
Deferred, Refund and Aggregation

