
Client Survey 2024/25
Quality and growth
How do we expand our services while meeting clients' expectations?
first actuarial

In just over 12 months, First Actuarial has opened two new offices – in London and more recently in Birmingham. And across all our seven UK offices, we've been recruiting staff to meet demand.

At the same time, we're diversifying our business by developing new services.

We've got a new team in place to provide a one-stop shop to help employers set up and manage their employee benefit packages. Pensions are a core part of that, of course, but in addition, we now offer group protection (life assurance, income protection and critical illness cover) and healthcare (private medical insurance, dental insurance and health cash plans) services.

In time, we will use our Client Survey to gauge the quality of those new offerings. But this year's survey focuses on our existing services, while we sustain the client-first approach that trustees and employers have come to expect across all our services.

Many thanks to those of you who took the time to fill in our survey.

> *You are pragmatic, and I applaud the fact that you are fair in the way you seek to charge fees. I have very good support across your teams.*
>
> **William Medlicott, Capital Cranfield**

What does our client survey say about your experiences of First Actuarial this year?

100% of trustees and employers said our standard of work was **EXCELLENT** or **GOOD.**

69% rated our overall standard of work as **EXCELLENT.**



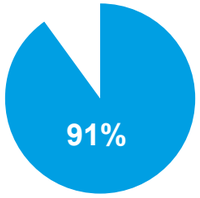
EXCELLENT

OR



GOOD

91% said we delivered **EXCELLENT** or **GOOD** value for money, with **34%** saying we delivered excellent value.





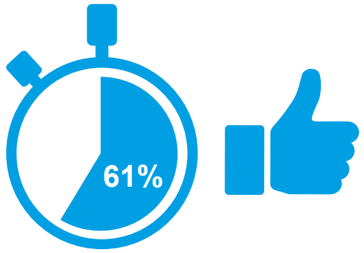
100% of respondents would be happy to recommend us to other organisations.

This is up from last year's score of 99%.





How well do we meet deadlines?



61% said we met every deadline every time.

Where we did miss deadlines, **99%** said we let them know in advance and kept them informed.

How clear is our advice?



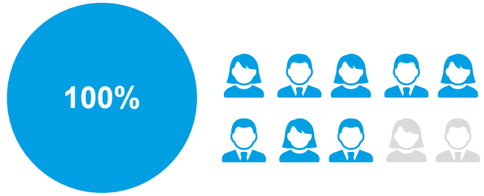
75% of clients understood our advice first time, or required only minor clarification.

> *Very reasonable fees, with plenty of information provided on any overruns. Much more communicative than other firms.*
>
> **Dan Gilmour, IGG**

How do you rate our actuarial services?

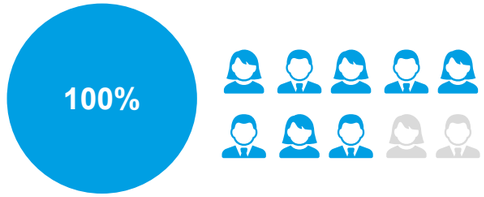
100% of respondents using actuarial services were satisfied or very satisfied with our consultants.

8 out of 10 said they were very satisfied.



100% of respondents using actuarial services were satisfied or very satisfied with the quality of advice we gave.

Almost 8 out of 10 said they were very satisfied.



82% said our actuarial services are better than their previous provider.

Of those, 43% said they are much better.



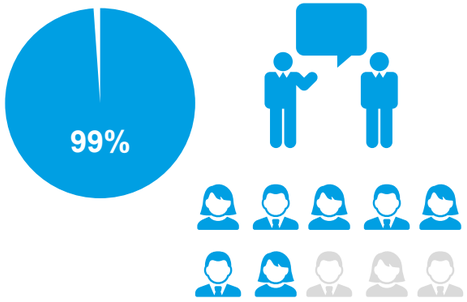
> *Recommendations are always pragmatic, practical and sensitive to the nature of our scheme and the employer.*
>
> **John McLeod, Educational Institute of Scotland**

How do you rate our administration services?

99% of respondents using administration services were satisfied or very satisfied with our consultants.

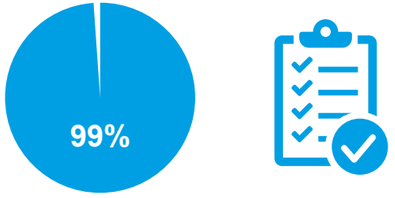
7 out of 10 said they were very satisfied.

No respondent reported being dissatisfied.



99% of respondents using administration services were satisfied or very satisfied with the quality of advice we gave.

More than 6 out of 10 said they were very satisfied.



80% said our administration services are better than their previous provider.

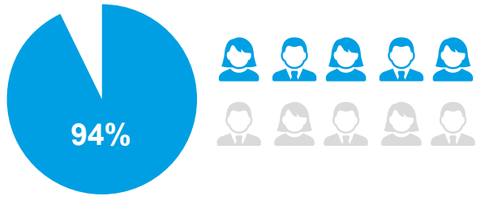
Of those, 55% said they are much better. No respondent expressed a preference for their previous provider.

> *The admin team are always easy to contact, very forthcoming and provide an excellent quality of service, with an emphasis on a positive and caring experience for members.*
>
> **Clare Adams, Vidett Governance Services Limited**

How do you rate our investment consulting services?

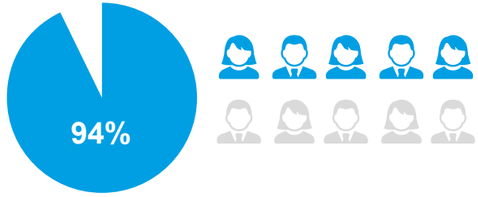
94% of respondents using investment consulting services were satisfied or very satisfied with our consultants.

Almost 5 out of 10 said they were very satisfied.



94% of respondents using investment consulting services were satisfied or very satisfied with the quality of advice we gave.

Almost 5 out of 10 said they were very satisfied.



59% said our investment consulting services are better than their previous provider. Of those, 40% thought they are much better.

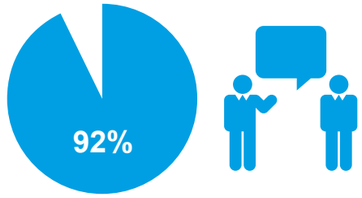
100% felt our services are at least as good.

> *Investment strategies are always a difficult subject to get your head around but First Actuarial ensure that they are fully explained to us trustees.*
>
> **Ian Murray, Fire Brigades Union**

How do you rate our DC consulting services?

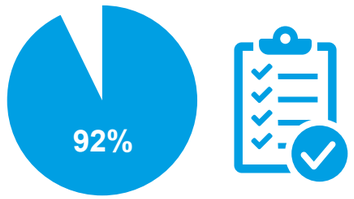
92% of respondents using DC consulting services were satisfied or very satisfied with our consultants.

Almost 5 out of 10 said they were very satisfied.



92% of respondents using DC consulting services were satisfied or very satisfied with the quality of advice we gave.

Almost 5 out of 10 said they were very satisfied.



70% said our DC consulting services are better than their previous provider.

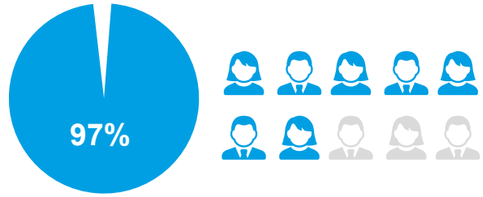
Of those, 40% said they are much better. No respondent expressed a preference for their previous provider.

> *The First Actuarial teams always feel like they are part of the overall scheme team, good collaboration.*
>
> **Phil Holland, Zedra**

How do you rate our scheme secretarial services?

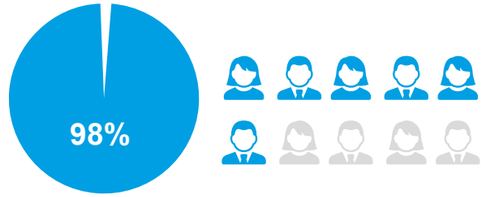
97% of respondents using scheme secretarial services were satisfied or very satisfied with our consultants.

Almost 7 out of 10 said they were very satisfied.



98% of respondents using scheme secretarial services were satisfied or very satisfied with the quality of advice we gave.

Almost 7 out of 10 said they were very satisfied.



74% said our scheme secretarial services are better than their previous provider. Almost 6 out of 10 said our services are much better.

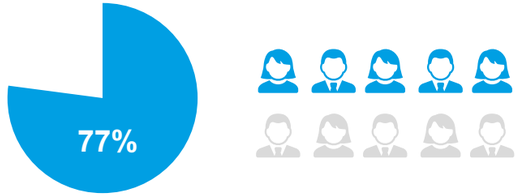
> *Excellent service, always very responsive.*
>
> **Ian Penfold, PremierFirst Vehicle Rental Pension Scheme**

How do you rate our Client Hub?

77% find our Client Hub very easy or easy to use. Almost 4 out of 10 find it very easy to use.

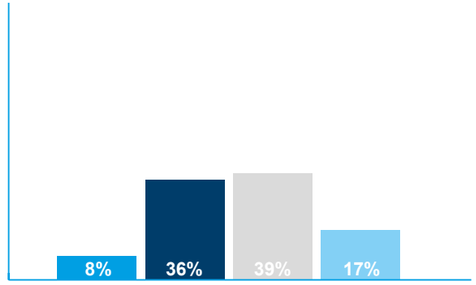
86% find it very useful or useful.

5 out of 10 find it very useful.



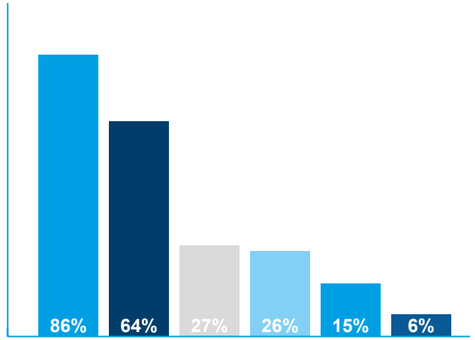
44% use the Client Hub at least once a month, and **8%** use it on a **weekly basis.**

- Weekly
- Monthly
- Quarterly
- Less frequently



What do clients use it for?

- Documents
- Governance
- Triggers
- Funding
- Assets
- Risk



Get in touch

Contact us today to discuss how we can help you.

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About us

First Actuarial LLP is a nationwide partnership with more than 500 staff covering seven offices.

We can help you run your scheme smoothly and effectively at reasonable cost.

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