Client Survey 2025/26



Scaling up quality

Delivering end-to-end
employee benefit services

first actuarial
A Gallagher Company

2025 was the year in which First Actuarial was acquired by A J Gallagher, to form one of the UK's largest pension and employee benefit consultancies.

Over 21 successful years, we'd grown a business known for its client focus. It meant a lot to be joining a company that espoused the same values.

But how are our clients experiencing the transition? This year's survey reveals a number of positive indicators, not least that 98% of clients remain happy to recommend us to other organisations.

Over time, the acquisition will open up new services to our clients. In fact, it's an expansion that's already well established. A range of employee benefit services now sits alongside our pension offerings.

Many thanks to those of you who took the time to fill in this year's survey.

> *The phrase 'big enough to count and small enough to care' seems to fit. The personal approach of the staff we encounter is excellent, and service-oriented*
>
> **Nick Charman, Pianoforte Supplies Pension Plan**

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

98% of trustees and employers said our standard of work was **EXCELLENT** or **GOOD.**

70% rated our overall standard of work as **EXCELLENT.**



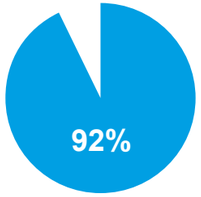
EXCELLENT

OR



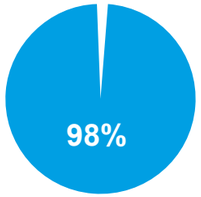
GOOD

92% said we delivered **EXCELLENT** or **GOOD** value for money, with **37%** saying we delivered excellent value.



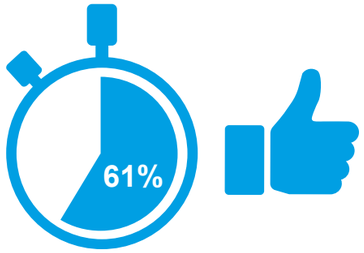


98% of respondents would be happy to recommend us to other organisations.





How well do we meet deadlines?



61% said we met every deadline every time.

Where we did miss deadlines, **98%** said we let them know in advance and kept them informed.

How clear is our advice?



85% of clients understood our advice first time, or required only minor clarification.

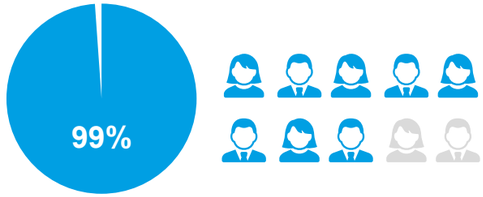
This is a big improvement from last year's 75%.

> *Proactive and efficient service at a reasonable cost.*
>
> **Dan Gilmour, IGG**

How do you rate our actuarial services?

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

Almost 8 out of 10 said they were very satisfied.



99% 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.



67% said our actuarial services are better than their previous provider.

Of those, 38% said they are much better.

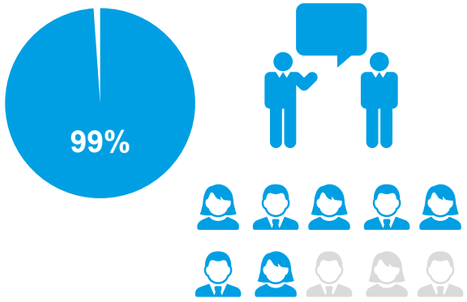
> *Fair fee structure – limited out of scope billing. Bespoke service from the team.*
>
> **Sean Richmond, Dalriada**

How do you rate our administration services?

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

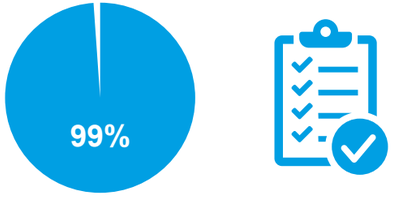
7 out of 10 said they were very satisfied.

No respondent reported being dissatisfied.



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

Almost 7 out of 10 said they were very satisfied.



72% said our administration services are better than their previous provider.

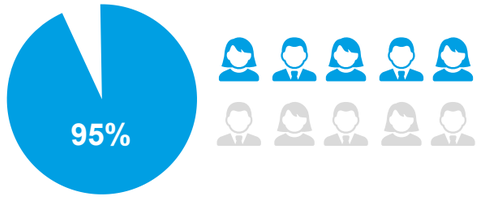
Of those, 49% said they are much better. No respondent expressed a preference for their previous provider.

> *The administration side of the Scheme is always up to date and very accessible via the online hub.*
>
> **Ian Murray, Fire Brigades Union**

How do you rate our investment consulting services?

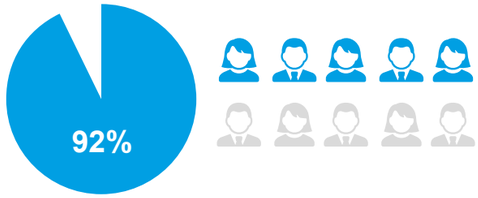
95% of respondents using investment consulting services were satisfied or very satisfied with our consultants.

More than 5 out of 10 said they were very satisfied.



92% 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.



65% said our investment consulting services are better than their previous provider. Of those, 27% thought they are much better.

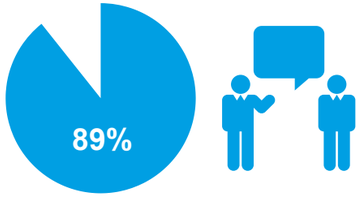
100% felt our services are at least as good.

> *First Actuarial provide clear quotes for any work we request in advance, agree a timeline for the work to be completed and then deliver to schedule. Their expertise is invaluable to us as we run a small scheme. They provide valuable nudges to remind us of work we need to do.*
>
> **Robin Webb, Church Army Pension Scheme**

How do you rate our DC consulting services?

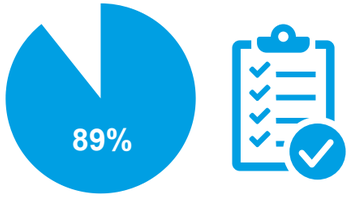
89% of respondents using DC consulting services were satisfied or very satisfied with our consultants.

Almost 7 out of 10 said they were very satisfied.



89% of respondents using DC consulting services were satisfied or very satisfied with the quality of advice we gave.

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



64% said our DC consulting services are better than their previous provider.

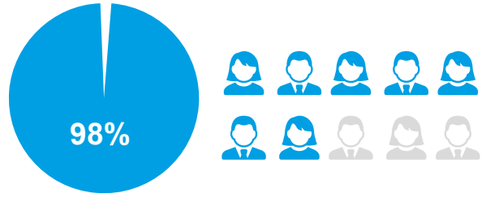
Of those, 29% said they are much better. No respondent expressed a preference for their previous provider.

> *First Actuarial led on the procurement of a DC scheme here at the University. Our consultant made the whole process clear, understandable, and easier to navigate.*

How do you rate our scheme secretarial services?

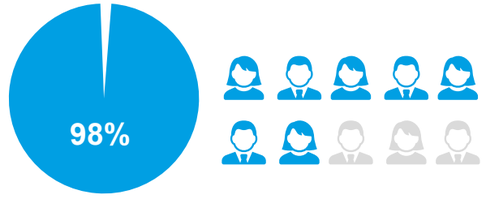
98% of respondents using scheme secretarial services were satisfied or very satisfied with our consultants.

More than 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.

More than 7 out of 10 said they were very satisfied.



72% said our scheme secretarial services are better than their previous provider. Of those, more than 4 out of 10 said our services are much better.

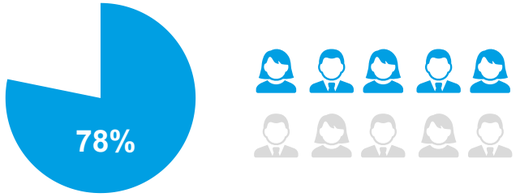
> *Support is great. Our scheme secretary does a sterling role in keeping the meeting packs arranged, often incorporating last minute amendments and updates.*
>
> **Andy Fay, Carclo**

How do you rate our Client Hub?

78% find our Client Hub very easy or easy to use. Almost 3 out of 10 find it very easy to use.

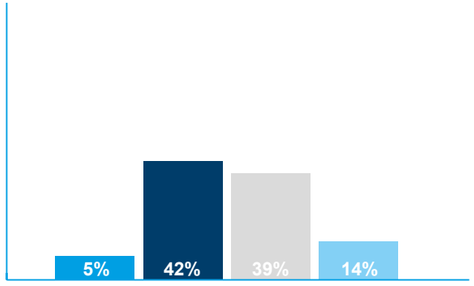
92% find it very useful or useful.

Almost 5 out of 10 find it very useful.



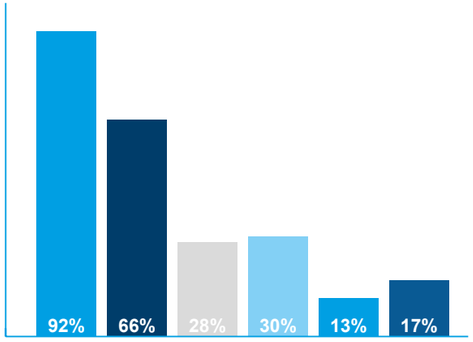
47% use the Client Hub at least once a month, and **5%** use it on a **weekly basis.**

- Weekly
- Monthly
- Quarterly
- Less frequently



What do clients use it for?

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



i **70%** of First Actuarial's administration clients now use the Client Hub.

Get in touch

Contact us today to discuss how we can help you.

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Partner and Head of Business Development and Marketing



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Tel: 0161 348 7469

About us

First Actuarial is owned by Gallagher, one of the world's leading insurance brokers, risk management and consulting firms. First Actuarial forms part of Gallagher's UK Benefits & HR Consulting division (GBS UK).

GBS UK is a leading provider in the pensions consultancy market, offering a full end-to-end retirement proposition, including actuarial and investment consulting, risk transfer, pensions administration and retirement communications. With experts positioned across all regions, we support pension schemes of all sizes across the full range of solutions.

First Actuarial operates nationally with more than 530 colleagues across seven UK offices. Our focus is on delivering high-quality advice and services with fair and transparent fees.

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