



Complaints Procedure

Excalibur Actuaries Ltd

We at Excalibur Actuaries realise that going through a divorce can be complex and stressful, particularly where pensions are involved. Excalibur Actuaries typically has over 300 cases that we are dealing with at any one time. We want to provide reports that are clear, timely and good value for money.

As experts reporting to the court, we have obligations under Family Procedure Rules to be impartial to both parties and to communicate in an open and transparent way. We are members of the Institute and Faculty of Actuaries and Academy of Experts. We endeavour to uphold the highest standards and, whilst complaints are extremely rare, we take them very seriously.

What to do if you have a complaint

Firstly, to ensure that there is no misunderstanding of the pensions on divorce report, please ensure any questions of clarification have been dealt with in accordance with paragraph 25.10 of the Family Procedure Rules

https://www.justice.gov.uk/courts/procedure-rules/family/parts/part_25#IDA0RU5B

Please mark any formal complaints for the attention of the director in charge of complaints, Richard Nobbs at rnobbs@excaliburactuaries.co.uk, or alternatively Caroline Bayliss at cbayliss@excaliburactuaries.co.uk. When sending a complaint please send details of the complaint, including:

1. The expert at Excalibur Actuaries involved in the case.
2. Who instructed Excalibur Actuaries and when.
3. Full details about the circumstances of the complaint with sufficient detail to enable us to understand the precise allegations of misconduct that are being made.
4. Any relevant evidence

What will happen next?

1. We will send you an email acknowledging receipt of your complaint within 10 working days of us receiving the complaint.
2. We will then investigate your complaint. This will involve reviewing our files and speaking to the members of Excalibur Actuaries involved.
3. Depending on the nature and circumstances of the complaint, we will respond as follows:
 - a. If we have any questions, we will revert back within 15 working days of our email of acknowledgement.
 - b. Send you a detailed written reply to your complaint, within 15 working days of the latest correspondence.



4. At this stage if you are still not satisfied you should contact us again and, if requested and we consider it appropriate, we will arrange for a review by a consultant. The review will be by a family law expert so that your complaint is reviewed by someone with extensive relevant experience.
5. We will write to you within 15 working days of receiving your request for a review, confirming our final position to you on your complaint and explaining our reasons.
6. If you are not happy with the outcome of our complaint's procedure, you may raise the issue with our professional bodies. Our experts are members of the Institute and Faculty of Actuaries and the Academy of Experts. Their complaints procedures (including any restrictions) can be found at:

<https://actuaries.org.uk/standards/independent-disciplinary-process/raising-a-concern/>

<https://academyofexperts.org/complaints/>

If we have to change any of the timescales set out above we will let you know.