

Guide to pensions records held at London Metropolitan Archives

London Metropolitan Archives: Information Leaflet Number 65



Contents

Contents.....	2
Introduction	3
The Pensions Archive Trust	3
Material contained in the Pensions Archive's collections.....	3
Minutes, Agenda and Correspondence	4
Annual Reports and Accounts.....	4
Trust Deeds and Rules.....	4
Actuarial Material	4
Pension Manager's Records.....	4
Scheme Member Registers and Contribution Record Books.....	5
Explanatory Booklets	5
Publicity Material.....	5
Collections held in the Pensions Archive	5
National Association of Pension Funds (LMA/4494).....	5
George Henry Ross Goobey (LMA/4481)	6
Society of Pension Consultants (LMA/4533).....	6
Sue Ward (LMA/4478).....	6
Lloyd's Superannuation Fund Pensions Management Limited (CLC/B/001)	7
Pensions material in LMA's collections	7
Business Collections:	7
City of London Corporation Collections:	7
Further pensions research.....	8
State Pension	8
Pension scheme details.....	8
About this leaflet	9

Introduction

This leaflet sets out:

- Information on the main types of records held by The Pensions Archive Trust (PAT) in the Pensions Archive at London Metropolitan Archives (LMA).
- Examples of other collections held at LMA which contain pensions material.

The Pensions Archive Trust

The development of occupational pensions in the UK over the course of the 20th century has been a story which weaves together British industrial and social history.

The Pensions Archive Trust (PAT) was formed in 2005 by a group of concerned pension professionals who wished to safeguard and preserve this history. The main aims of PAT are:

- To establish and maintain the Pensions Archive, in formats that will ensure both the security of valuable historical records and optimum accessibility to all interested parties.
- To advance the education, both of the general public and of those involved in the operation of occupational pension schemes.

In 2006, PAT entered into a partnership with LMA to promote and develop the study of the history of occupational and personal pension provision in the UK, providing a central source of information for researchers and students, and providing access to examples of the practices and standards that have been adopted over the years in relation to the management and administration of occupational pension schemes.

Full details on PAT can be found on the PAT website www.pensionsarchive.org.uk.

Material contained in the Pensions Archive's collections

Records held by PAT tend to take the form of records of associations and business records focusing on the details of the operation of pension schemes, rather than the information on individuals enrolled in these schemes. However, some scheme member registers are held in

other LMA collections, mostly dating from the later 19th and early 20th centuries, and these registers contain more detail on individual scheme members. Access to more recent information in such registers may be restricted by the Data Protection Act.

The most commonly found types of material in pension collections can be identified as:

Minutes, Agenda and Correspondence

This material usually relates to specific committees or Trustees' meetings within a scheme or organisation.

Annual Reports and Accounts

These provide information, such as the audited accounts and a report by the trustees on the progress of the scheme, for scheme members and other interested parties. The range of information provided has changed, and increased, over time in response to legislation. The impact of legislation on pensions administration can therefore be traced through successive reports.

Trust Deeds and Rules

Formal documents which govern the running of the pension scheme and set out how benefits are calculated and payable. Trust Deeds are used to establish, regulate and amend a pension scheme; Scheme Rules contain the definitive, detailed provisions of the scheme.

Actuarial Material

An Actuary is a professional adviser on financial questions involving probabilities. Actuarial reports (usually issued triennially) evaluate the ability of a pension scheme to meet its liabilities. Successive reports give a good history of how a scheme has developed.

Pension Manager's Records

These usually contain correspondence from the Pension Manager, as well as other documents.

Scheme Member Registers and Contribution Record Books

These registers give the names of members of schemes and usually include some personal information about these individuals. As most of these ledgers were produced during the 20th century, access by general researchers is restricted by the Data Protection Act.

Explanatory Booklets

These are produced for members of the pension scheme and outline what members can expect to receive from the scheme, how their contributions are made, and different types of membership they can obtain.

Publicity Material

This can take the form of many different media, including leaflets, promotional films, posters and CD-ROMs.

Collections held in the Pensions Archive

PAT collections held at LMA cover many facets of pensions history. Collections have been donated from national pension bodies, individuals involved in the pension profession, individual company schemes, and personal libraries. PAT's aim is to collect material to give as wide a view of occupational pensions as possible.

For a full list to the archive collections visit the Pensions Archives' website www.pensionsarchive.org.uk/our-collections

In addition to archival material, PAT also has a library containing pension publications, research papers and journals which cover all aspects of the pension industry. This is also stored at LMA, and lists of the holdings can be found on [the City of London library catalogue](#).

A few notable examples of PAT archive collections are:

National Association of Pension Funds (LMA/4494)

The National Association of Pension Funds is the principal body representing occupational pension schemes and those managing pension schemes in the UK. The collection is a great example of how a national organisation expanded to become a key force in influencing

pensions legislation and providing a voice for its members across the UK.

Materials held in this collection reflect the activities of the Association. They take the form of minutes, agenda, reports and correspondence from various committees; secretary's files; documents concerning membership; publicity and outreach material, including conference publications, yearbooks, published reports and surveys; photographs; and audio-visual material, including promotional videos.

George Henry Ross Goobey (LMA/4481)

Goobey, George Henry Ross (1911-1999), pension fund manager to Imperial Tobacco and involved in many other organisations. Over 400 subject files relating to the pensions and investments industry and personal involvement in clubs and other organisations, 1905-1999

Society of Pension Consultants (LMA/4533)

The Society of Pension Consultants (SPC) was formed in 1958 by the Insurance Brokers Organisation and is the representative body in the UK for the providers of advice and services needed to establish and operate occupational and personal pension schemes and related benefit provision. This collection shows how a national organisation provided advice and comment on various aspects of pensions legislation over the latter half of the 20th century through minutes of meetings, records relating to SPC events, and records of its membership trends.

Sue Ward (LMA/4478)

Sue Ward is an independent authority on pensions, a journalist, author, researcher and trainer since 1984. Her involvement with pensions has resulted in her collecting a wide range of material touching on some of the key work and campaigns affecting the pension profession during the last three decades of the 20th century. The collection covers her work with the Labour Party, the establishment of the Northern Pensions Resource Group, the Occupational Pensions Regulatory Authority, and the Trade Union Congress Social Insurance Department. She was also a member of the Goode Committee on pensions law reform, set up in the wake of the Maxwell Scandal.

Lloyd's Superannuation Fund Pensions Management Limited (CLC/B/001)

Established in 1929 as the Lloyd's Clerks' Superannuation Fund, Lloyd's Superannuation Fund was set up for the purpose of providing pensions for male Clerks employed in the business. As well as being an excellent example of a large pension organisation administrating the pension funds of many different companies, this collection also complements the collections of Lloyd's of London which are also held by LMA. It can therefore provide researchers with an insight into this section of the insurer's operations which was, until the acquisition of this collection, largely hidden from researchers. The collection includes minutes of all main committees, papers of the Pension Manager, annual reports and accounts, member ledgers, individual scheme reports, actuarial valuations of the Fund and schemes, and Fund publicity material.

Pensions material in LMA's collections

Aside from the Pensions Archive's collections, London Metropolitan Archives' extensive collections contain other excellent examples of pension schemes, covering many different kinds of organisation. Here are just two examples:

Business Collections:

Courage, Barclay and Simmonds (Brewers) (ACC/2305)

Records of the brewing industry held at LMA are particularly strong in details of the pension arrangements brewing companies set up for retired employees. Records of the Courage, Barclay and Simmonds Breweries are perhaps the most detailed, recording not only employees' savings and their relationship with the company pension fund once they had left the company, but also how the funds of various breweries worked as they merged over the years. These records largely date from the mid-20th century.

City of London Corporation Collections:

Billingsgate Market (CLA/010)

Billingsgate Market is the oldest of the markets owned by the Corporation of London, and contains pension records for its staff dating back to 1893. As well as a great example of one of the Corporation's

wide areas of responsibility in the City, the pension records contain details of staff contributions to the pension fund, their rank and job title.

Further pensions research

State Pension

The Pensions Archive focuses on occupational and personal pensions and therefore does not contain material relating to the establishment of the State Pension.

The Parliamentary Archives contain records of Parliamentary debate surrounding the establishment of the Old Age Pensions Act (1908), as well as the original Act itself. Records can be accessed through the Parliamentary Archives' reading room. Details of facilities, opening times and access to the Parliamentary Archives' online catalogue can be found at their website www.parliament.uk.

The National Archives contain government records on the implementation of the State Pension. These can be accessed through the reading rooms at the National Archives' building in Kew. The online catalogue can also be accessed at their website www.nationalarchives.gov.uk.

Pension scheme details

The Pensions Archive does not hold contact details for individual pension schemes. The UK government runs a Pension Tracing Service, to assist people who have lost track of their former employer's pension details, or who no longer know whom to contact to find out information they need before retirement. Contact details for the service are:

Pension Tracing Service
The Pension Service
Tyneview Park
Whitley Road
Newcastle Upon Tyne
NE98 1BA.

The Pension Tracing Service can be contacted by phone on 0845 6002 537 (lines are open 8.00 am to 6.00 pm), from overseas +44 185 176 7476, or by text phone call 0845 3000 169.

Details are also available on the Directgov website at www.directgov.uk.

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