



**Legal &
General**



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Overview of our client and customer services

Another successful year at the CCA Awards



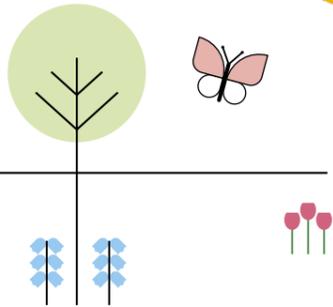
In April, we were thrilled to win six awards at the Customer Contact Association's (CCA) Global Excellence Awards 2023. This marked our most successful ever year at the customer service industry's blue riband event.

We picked up two prestigious accolades in the Great Places to Work and 5 Years of Excellence categories. In addition, colleagues from across our business won four individual awards. LGRI's Lauren Alexander and Jo Luckins won Emerging Leader and Inspiring Leader respectively for Women in Leadership.

Jo Bradley, in our Retail business won bronze in the Team Manager award category and our Customer Services Manager, George Hutchinson, was named Manager of the Year.

Britain's Most Admired Company 2022

Britain's Most Admired Companies study is the longest-running annual survey of corporate reputation in the UK with data going back more than 30 years. We're proud to have been crowned Britain's Most Admired Company for 2022. This marked the first time in 25 years that a financial services company has won. We scored consistently strongly across all 13 measures of reputation, securing the highest ratings of all companies for Inspirational Leadership and ESG and ranking top among FTSE listed companies in the UK.



“With the CCA Awards regarded across the industry as the ultimate recognition for customer service excellence, this is a momentous achievement. Our Client and Customer Services team are the face of our UK business, and our world-class excellence continues to set us apart in a hugely competitive PRT market that’s forecast to grow significantly over coming years.”

Andrew Kail, Chief Executive Officer,
Legal & General Retirement Institutional



Our new-look customer lounge

We've recently revamped our online **Customer Lounge** which hosts a wide range of information for our defined benefit policyholders.

As an organisation, we always strive to ensure customers are well informed about their pension and have access to the support needed to help them make informed decisions.

Our customer lounge includes a host of useful resources including articles, videos, and FAQs, as well as signposting to organisations that can help customers to better understand their finances.

We returned to BBC Gardeners' World Live for the fourth time



Our Head of Client Services Proposition, Yawar Choudhry, tells us how our flagship member event helps us to deliver customer service excellence.

"I recently had the great pleasure of returning to our flagship customer event, BBC Gardeners' World Live. It was fantastic to meet with our customers in person and establish connections that go far beyond our digital and phone-based interactions.

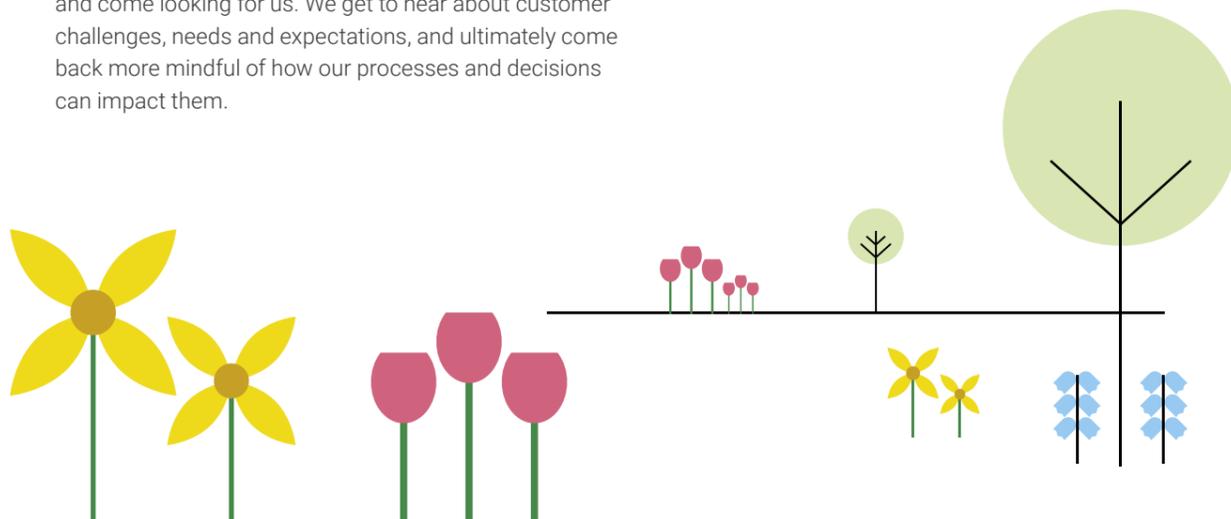
This is the fourth time L&G has sponsored this event and it left me feeling invigorated, inspired, and assured of the trust customers have in our brand. This event underlines our commitment to customer satisfaction and enables us to build stronger relationships with pension scheme members.

Months of meticulous planning and preparation culminated in our L&G Customer Lounge adorned in our brand's signature colours and imagery. We were located in the event's well-known Floral Marquee and our lounge fitted right in amongst all the colourful displays with some great live music from a String Quartet. We were told we had the best coffee, and our L&G branded cupcakes went down a treat.

There are customers who attend the event every year and come looking for us. We get to hear about customer challenges, needs and expectations, and ultimately come back more mindful of how our processes and decisions can impact them.

From the conversations we had at the event, it's clear that our brand is highly respected and that people appreciate the 35 years' worth of expert knowledge our customer service team has. The insights we gain are valuable in helping to shape our servicing strategy for the future. Fostering meaningful connections helps us to continue to put our customers and clients at the heart of everything we do."

Watch our BBC Gardeners' World Live highlights video.



Our apprenticeship programme

As part of our new starter programme, we've taken on some apprentices to support and encourage people looking to build a career within the industry. Our apprenticeship programme aims to diversify our recruitment methods, finding and developing talented individuals to address our business needs, and helping us support a growing market.

We worked with Corndell, an apprenticeship provider, who helped us to recruit two apprentices who joined our Payroll Services team in September last year. They will be with us for a 13-month period and have been fully integrated within the team, managing their own portfolio of buy-in scheme payrolls, alongside completing their college work.

Jo Luckins, Head of Payroll Services, Legal & General Retirement Institutional: *"This has been a learning experience for everyone involved and has been very rewarding on all sides. The apprentices have brought a different energy and diversity to the team, and we hope to be able to offer them a permanent role once they are qualified."*

We are looking forward to taking on a further six apprentices this year, who will be placed in various Client and Customer Services teams.



Our customer service ethos –

Our multi-award-winning Client and Customer services team highlight how we put customers at the heart of everything we do.



Dave Poulton
Chief Customer Officer

Meet our Client and Customer service teams –

Meet the teams who are responsible for delivering an outstanding service to clients and their pension scheme members.



Vicky Spill
Transition Consultant

Consumer Duty – Delivering better outcomes for our customers

The Financial Conduct Authority (FCA) has introduced a Consumer Duty regulation, which aims to ensure that existing best practice around good outcomes for consumers is applied consistently across the financial services industry.

Firms need to consider the diverse needs of their customers, including those in vulnerable circumstances, and adjust their service approach where necessary. The new regulations are designed to make sure products and services are fit for purpose and provide fair value. Firms are required to support customers at every stage of the

product/service lifecycle with clear information that customers can understand so they can make informed financial decisions.

At Legal & General, looking after customers is our number one priority and we have always strived to deliver good customer outcomes. We welcome the FCA's aims in introducing the Consumer Duty, which aligns with our own customer care ethos.

For more information, please visit the [FCA website](#) where you can find out more about the Consumer Duty.



Contact us

For further information, please contact:



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