

AFL Communication Guidelines for Single Joint Expert Reports

Please see below details of the guidelines which we would kindly ask you to follow once we have been instructed to prepare the Pensions Sharing on Divorce Report:

- For the purpose of transparency, we would request that we do not receive any telephone calls regarding the case, and instead all communication, including any questions you may have, be made by email, ensuring the other party is copied in.
- Where we are instructed by a solicitor acting on behalf of the client, we would request that all communication is made via the solicitor and that we do not receive any communication directly from the client unless this has exceptionally been specifically agreed with ourselves and both instructing parties.
- We may raise questions either at the time of issuing our fee letter or as the case progresses. It is very important that neither party responds to such requests individually, giving their own view. Both parties must discuss the questions raised with each other and then provide us with an email setting out your agreed joint position on any point raised with the other party copied in. (Again, please note that Actuaries for Lawyers should not be copied in to correspondence between each of you whilst you are trying to reach agreement). If it is not possible for you to reach agreement on a joint position, then one party would need to make an application to the Court for a ruling on any points under dispute. Once the Court has made a ruling, Actuaries for Lawyers should be provided with a copy of the ruling attached to an email sent by one party with the other party copied in.
- Any variation to the letter of instruction needs to be agreed in correspondence between both parties (which we should not be copied in to) with the final agreed variation being confirmed to us by email with the other party copied in. This variation email must state that this variation to the original letter of instruction has been agreed by both parties.

We work on a fixed fee basis which means the fee for the report is agreed at the outset of our instruction. Our fee is based upon our expectation of the amount of work, including correspondence, that will be necessary to finalise our report. If the parties do not follow the procedures as set out above, this can lead to significant extra work both dealing with and responding to correspondence received and therefore it may be necessary for us to make additional charges which would be split between both parties and added to our final invoice. We will write to both parties to advise the extra costs as they are incurred. However, should the procedures detailed above be followed, we would not expect that extra charges would be necessary.

Completion of our report

Once our report has been issued, you are welcome to submit any questions in relation to this by email. We would typically answer a limited number of clarification questions free of charge and we would ensure that any questions and answers are shared with both parties. For any questions submitted more than ten days after the report is issued, we would require agreement from both parties to answer the questions raised, in order to meet our obligations as a single joint expert. Please note that we reserve the right to charge additional fees where a more extensive list of questions is asked concerning the report or where further calculations or figures are requested to be provided.