



## **Employee Benefits - Workplace pensions / Auto Enrolment**

### **Initial consultation meeting**

- Government legislation requirements and timescales
- Existing employer arrangements
- Benefits of scheme implementation
- Employer requirements

Free of charge

### **Employer duties workforce assessment report**

- Summary of Employer Duties
- Assessment of workforce
- Assessment of existing schemes against auto enrolment criteria
- Salary exchange option
- When changes affect your company and What you need to do
- Non-compliance implications
- Employer duties for different types of workers
- Scheme certification

### **Scheme, Design and Implementation**

- Provider availability research and recommendation
- Consultation on scheme design and rules
- Salary exchange option review
- Review of payroll / 'middleware' requirements
- Consultation of employee communications
- Implementation of scheme including default fund selection
- Provider information and documentation
- Employee presentation of scheme and benefits
- Suitability Report

### **Additional employee consultation**

- Benefits of pension planning
- Legal requirements
- Value of company pension benefit to an employee
- Practicalities of group scheme



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### **Ongoing scheme service review**

- Review of ongoing scheme suitability
- HMRC & Pension regulation change
- Default fund performance
- Company employee benefits
- Employee awareness and engagement

### **Additional review services**

Employee 'at retirement' review

Employee personal financial planning review

See individual advice service and cost document for further details.

The value of pensions and the income they produce can fall as well as rise. You may get back less than you invested.

Auto Enrolment and Employee Benefits are not regulated by the Financial Conduct Authority.

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