

Auto Enrolment Essentials





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| YOUR DUTIES | OUR SERVICE |
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| <ul style="list-style-type: none">• Understand what you need to do to comply with the legislation | <ul style="list-style-type: none">• Face to face meeting to advise you on what you need to do to comply with legislation and how to minimise the cost and disruption of auto-enrolment to your business |
| <ul style="list-style-type: none">• Register an employer contact with The Pensions Regulator | <ul style="list-style-type: none">• Register an 'Employer Contact' with The Pensions Regulator on your behalf |
| <ul style="list-style-type: none">• Check who to enrol | <ul style="list-style-type: none">• Provide a Workforce Assessment to establish which employees are likely to be auto-enrolled |
| <ul style="list-style-type: none">• Check costings of alternative contribution basis, phasing in of contributions, and use of postponement | <ul style="list-style-type: none">• Provide costings of alternative contribution basis for your business• Provide guidance on phasing of contributions to help you minimise costs• Provide guidance on the use of postponement at staging date, for newly eligible employees, and new starters |
| <ul style="list-style-type: none">• Choose a Qualifying Workplace Pensions Scheme | <ul style="list-style-type: none">• Recommendation Report including recommendation of a Qualifying Workplace Pension Scheme for your business* |
| <ul style="list-style-type: none">• Set up Qualifying Workplace Pension Scheme | <ul style="list-style-type: none">• Set up a Qualifying Workplace Pension Scheme on your behalf |
| <ul style="list-style-type: none">• Update your payroll to ensure accurate assessment, enrolment, deductions, contributions, and communications | <ul style="list-style-type: none">• Communicate Qualifying Workplace Pension Scheme set up details with your payroll to ensure payroll is updated on agreed basis. This will help to ensure accurate assessment, enrolment, deductions, contributions, and communications at staging date and on an ongoing basis |
| <ul style="list-style-type: none">• Pay contributions into a scheme | <ul style="list-style-type: none">• Establish a clear process with your payroll to ensure payroll pay contributions into the scheme by the due date. |



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| <ul style="list-style-type: none"> • Issue statutory communications to your staff | <ul style="list-style-type: none"> • Provide customised statutory letter template that you will need to issue to each of your staff at your staging date and also to future new starters |
| <ul style="list-style-type: none"> • Manage opt in and opt out requests | <ul style="list-style-type: none"> • Recommended Qualifying Workplace Pension Scheme will be able to facilitate online and telephone opt-out requests to help minimise ongoing administration |
| <ul style="list-style-type: none"> • Comply with ongoing duties | <ul style="list-style-type: none"> • Establish a clear processes ahead of your staging date to help ensure you comply with the legislation at your staging date and on an ongoing basis |
| <ul style="list-style-type: none"> • Complete declaration of compliance with The Pensions Regulator within 5 months of your staging date | <ul style="list-style-type: none"> • Complete declaration of compliance The Pensions Regulator on your behalf |

*We understand that many employers are looking to minimise the cost of auto-enrolment and therefore we only recommend schemes that have confirmed they will accept the statutory minimum Qualifying Earnings basis for contributions and do not incur an ongoing employer charge.

We only recommend schemes that have been independently reviewed to demonstrate they meet the standards set out in the master trust assurance framework developed by the ICAEW (Institute of Chartered Accountants in England and Wales) in partnership with The Pensions Regulator.

We also only recommend schemes that have achieved the Pensions Quality Mark (PQM) READY kite mark.

| Essentials Micro Employer: 1-9 employees | Essentials Small Employer: 10- 49 employees |
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| £599 + VAT | £699 + VAT |

