

YOUR WORKPLACE PENSION IMPLEMENTATION PLAN

Your implementation manager will guide you through each step of the implementation process and can answer any questions you have. You can refer to this implementation plan along the way so you know what happens and when.



START YOUR JOURNEY

- Contact you and your adviser to introduce themselves
- Explain the implementation process
- Arrange a call to go through your scheme fact find
- Provide support material to help you get ready



GETTING THE DETAILS RIGHT

- Carry out a detailed fact find so they fully understand your requirements
- Prepare your pre-filled scheme application form, which is also your legal agreement
- Discuss how we can help you raise awareness of the new scheme



GET YOUR DATA READY

- Set up an online meeting to explain what data we need from you
- Supply you with a data template and data guide
- Check if you can provide the data in the correct format
- Let you know if you need to make changes to the data



LEARN THE ROPES

- Arrange your access to our online service
- Provide training and support on how to run your scheme online
- Give you a pre-filled Scheme Certificate (if appropriate)
- Help you with cyclical re-enrolment (if appropriate)



RUN YOUR SCHEME

- Make sure you're comfortable running your scheme
- Answer any final questions you have
- Give you an opportunity to feedback on your implementation experience
- Introduce you to your dedicated servicing team

Your implementation manager will...

You'll need to...

- Decide who you'll need to involve during the implementation process
- Review our online support material
- Get ready for your scheme fact find call

- Review our online support material
- Join a call to confirm how your scheme will be set up
- Review, sign and return the completed scheme application form
- Let us know what awareness communications you'd like to use

- Establish where you'll get your data from and who you'll work with to get your data ready
- Review our data guide and template and join a call to understand what data we need from you
- Check that the data you send to us is accurate
- Send us your final data

- Join a series of one-to-one training sessions
- Start running your scheme online after your training
- Print, sign and store your Scheme Certificate within a month of your new scheme's start date (if appropriate)

- Keep a note of the details for your dedicated servicing team in case you need them
- Provide us with feedback on your experience so far, if you're happy to do so

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