

AUTO ENROLMENT IN 3 EASY STEPS

Step
01



Required Documentation

We complete:

- The **Master Trust Application Form / Deed of Participation** (confirms compliance with the Auto Enrolment Regulations).
- The Member Data **CSV file**: listing all your employees' details (We will send you a copy via email for you to complete in case you process the Payroll).

Assessment of Eligible & Non-Eligible Employees

Our Master Trust Experts will:

- Complete the assessment
- Audit the CSV files
- Issue your **Welcome letters** and **Eligible and Non-Eligible** letters, advising employees on their Pension rights and terms, which will be sent to them

Poppypride will complete the **Declaration of Compliance**



Step

02



Step
03



Let the Fund Begin!

We process the ongoing Payroll CSV file (listing all your employees' details including employer and employee contributions)

- The **Focus Balance fund** (default fund) is assigned to each employee, managed by our experts and reviewed by our investment advisers
- Each employee may also self-select from other available funds
- All participating members will have online access to the portal where they can view their investments, in real time, by simply logging in with their username and password

Our Pensions Manager will help you in:

- keeping track of New Members and Leavers
- handling enquiries and administration
- the Mandatory Three Year Re-Enrolment Process

Account Managers will:

- continuously monitor customer care
- manage inquiries through our website