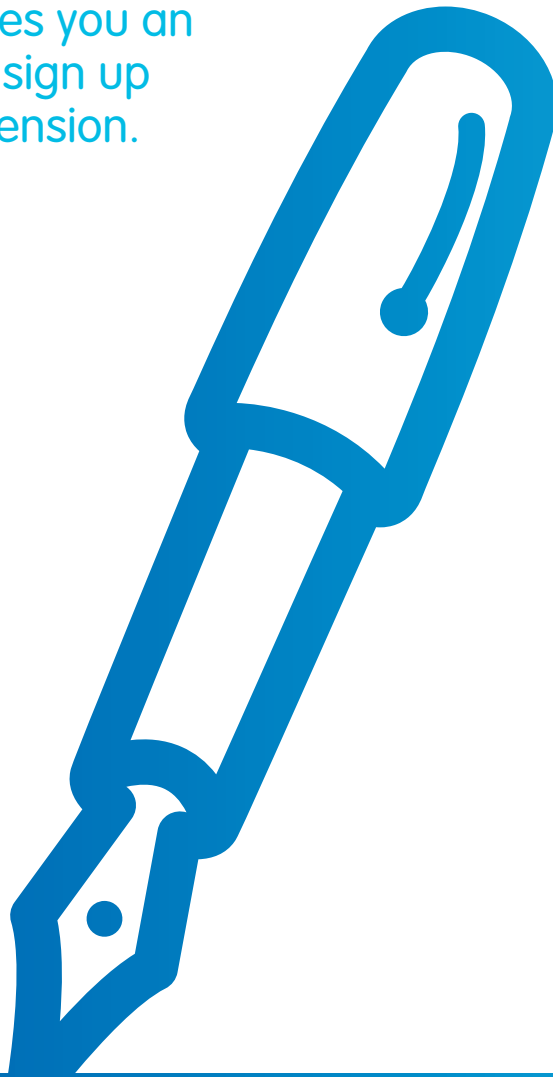


Quick
guide

Signing up with The People's Pension

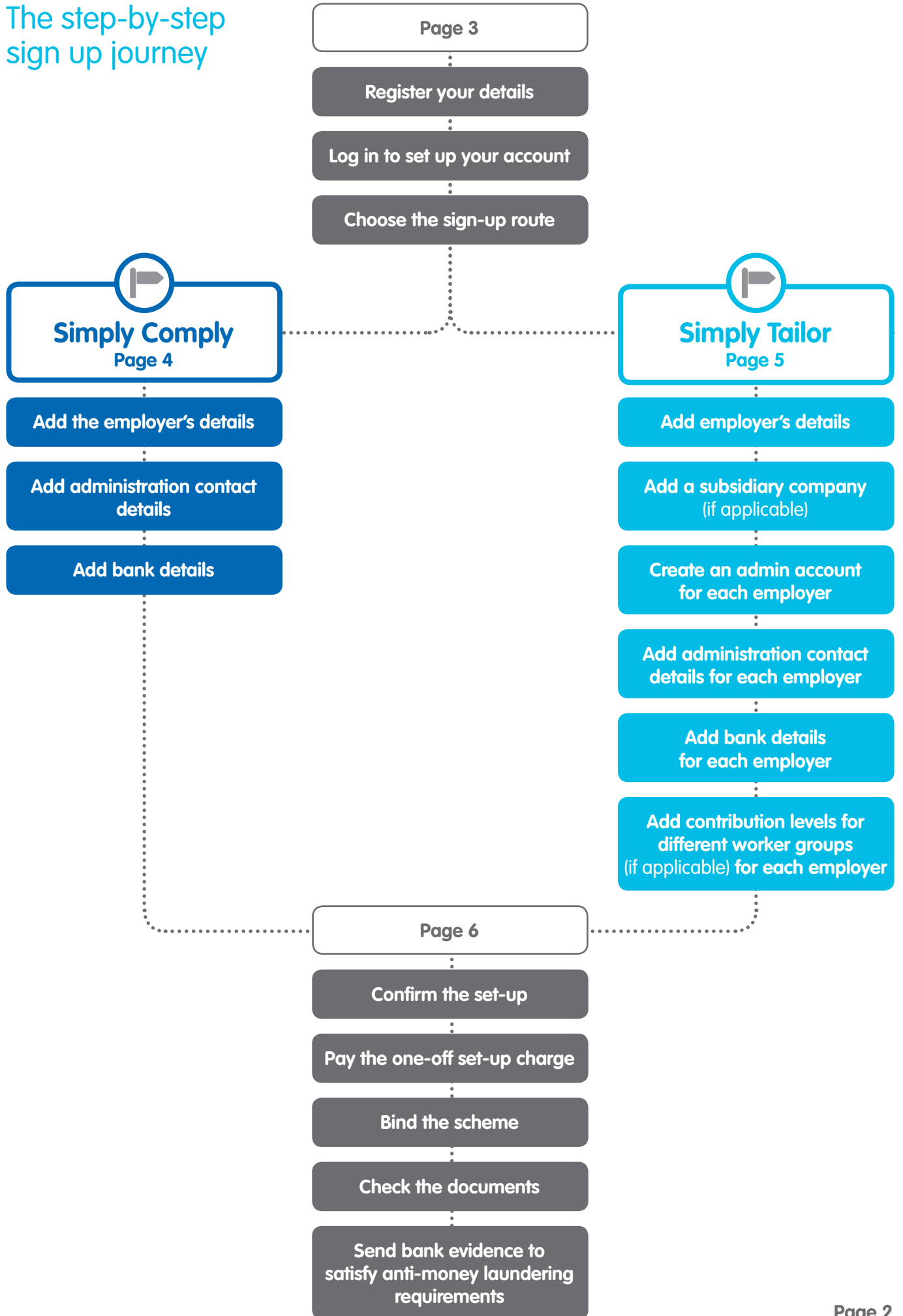
This short guide gives you an overview of how to sign up with The People's Pension.



For people, not profit

the
people's
pension

The step-by-step sign up journey



Register your details

Visit our website at www.thepeoplespension.co.uk and look for the sign-up links in the employers' section.

You'll need to enter your email address and register your details. We'll use this email address to send you your temporary password and activation code.

Click the link in the email and log in using the temporary details provided.

Log in to set up your account

Answer the questions on screen about the industry the employer works in and when pension contributions will be deducted from employees' pay. This will help us determine whether you can sign up using our simplified route, Simply Comply, or whether you need our Simply Tailor route.

For some employers our Simply Comply route won't be suitable.

Choose your sign-up route

We have two sign-up routes: **Simply Comply** and **Simply Tailor**.



Simply Comply is designed to help employers meet the minimum requirements for automatic enrolment legislation. It's easy to use and ensures that the employer is complying with their legal duties.




Simply Tailor is our bespoke sign-up route designed to give the employer total control and flexibility. It may take a little longer to set up but it allows different options that best suit the employer's needs.

When you sign up we'll give you more details about both options and let you decide.





Simply Comply is designed to help employers meet the minimum requirements set out by automatic enrolment legislation. It's easy to use and ensures that the employer is complying with their legal duties. Once you've selected the 'Simply Comply' route we'll ask you for more details about the employer. And you'll be able to click the  icon if you need more information.



Tell us some basic details about the employer, employees and the payroll.



We'll ask for contact details for the person who will be administering the account.



We'll also ask for the employer's bank details so we can set up a direct debit to pay pension contributions.





Simply Tailor

Add employer's details

Create an admin account for each payroll

Add administration contact details

Add bank details

Add contribution details

Simply Tailor is our bespoke sign-up route designed to give the employer total control and flexibility. It may take a little longer to set up but it allows different options that best suit the employer's needs.

Tell us some basic details about the employer.

Set up an admin account for each payroll, for example, if the employer has a weekly and a monthly payroll you'll need to set up two admin accounts. We'll ask you information about how often employees are paid, when the first contributions will be deducted and information about the payroll software provider (if the employer has one).

We'll need contact details for the person who will be administering the account.

We'll also ask for the employer's bank details so we can set up a Direct Debit to pay pension contributions.

You'll need to tell us what contribution levels will be made for each group of employees, for example some employees may be contributing 2% to their pension and some 5%. We call these worker groups. You'll need to add new worker groups for each contribution level

If you're setting up a scheme for more than one employer you'll need to click

Add subsidiary **+**

and repeat the steps above for each company you add.

**Confirm the details
you've provided**

You're able to look through the details you've provided. Once you're happy you can confirm the set-up.

Pay the one-off set-up charge

We charge a one-off set-up charge. This is an employer charge and can be paid by Direct Debit using the details already submitted or it can be paid by credit or debit card.

Bind the scheme

Please read our terms and conditions. We will ask if you have the authority to 'bind' the employer to the scheme. This means you agree to enter into a legal and binding contract with B&CE (provider of The People's Pension). Because this is a legally binding contract, you need to ensure you have the appropriate authority to do this. We provide some guidance notes on this but if you're still unsure whether you have the appropriate authority you should select 'No' from the drop-down list. You can then give us the details of the person with the appropriate authority and we'll ask them to bind to the scheme to complete the set-up.

Check the documents

We'll provide you with copies of the letter of agreement, Direct Debit mandate and the pension scheme rules. These are also available in the 'Useful documents' section in the Online Services account which is set up once sign-up is complete.

Send bank account evidence

Companies in the finance industry are required to find out more about the customers they are doing business with. This includes checking the source of the employer's funds. Because of this we require a copy of a paying-in slip, void cheque or bank statement for the account being used to pay the Direct Debit.

Set-up is complete!

Once you've followed these steps, you'll have completed the set-up process and be able log into your Online Services account at <https://onlineservices.bandce.co.uk>.