

**Free for advisers, agents & employers.
Great value for employees.**



Using Smart Pension's Administration Platform employers, their advisers and agents can manage their full automatic enrolment administration obligations in one sitting, at no charge to the adviser, agent or employer:

- Complete auto-enrolment administration using our end-to-end solution
- Upload employee data (bulk options available)
- Upload payroll data (bulk options, "PAPDIS" and payroll integrations available)
- Manage postponement of all or individual employees
- Assess employees (Regulator compliant calculations)
- Calculate pension contributions automatically
- Make payment by secure Direct Debit (single page set up)
- Generate compliant communications (letters) to employees
- Create "Employee Groups" to offer higher % employer contributions (above the statutory minimum) to key groups of employees (and to require matching by employees, if desired)
- We also accept "pre-assessed" contributions data, for employers using payroll software solutions that carry out assessment & communications
- Historical record maintenance and report generation
- Invite one or more adviser or agent to oversee or manage the administration

Flexible and sophisticated data upload & download capabilities

- Excel spreadsheet templates for employers who don't use payroll software or professional payroll services to upload and download employee and payroll data
- .CSV file format templates for employee, payroll and contributions data upload and download generated from, and for, payroll software
- API/EDI options available. This means that some payroll software providers' systems can automatically exchange employee and payroll data with our pension scheme at the click of a button. This will become more prevalent as payroll software companies integrate with our market-leading API

Member area for employees

- Manage and monitor their own pension scheme
- Update their contact and other personal details
- Choose to adjust their additional voluntary contributions (AVC)
- Opt out or leave the scheme

Members can request documents and information from customer support

- Expression of Wishes form
- Transfer in request form
- Transfer out request form
- Scheme Valuation

Payroll software compatibility

- Please see the attached document