

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



**The UK's most advanced technology workplace pensions platform for payroll providers, accountants & bookkeepers, IFAs or other adviser or agents, that allows them to manage a portfolio of clients through their automatic enrolment obligations in minutes.**

- Set up your adviser / agent company on the Adviser Platform
- Set up members of your team as 'Users' within your account
- Start uploading your portfolio of client companies. That's it!

**Using the Adviser Platform, advisers and agents can:**

- Sign up your clients to the Smart Pension workplace pension scheme (AutoEnrolment.co.uk Master Trust-L&G + HSBC (Sharia) funds) Our master trust is accredited under the Pensions Regulator's Master Trust Assurance Framework (MAF).
- Retain full or restricted access to your clients' ongoing administration to either:
  - a. Actively manage the ongoing automatic enrolment administration obligations for the clients; or
  - b. Invite your client or their accountant/payroll administrator to manage the ongoing auto enrolment administration obligations themselves

**Support & guidance**

- "Live Chat" with our team on our website: [www.AutoEnrolment.co.uk/Adviser](http://www.AutoEnrolment.co.uk/Adviser)
- Call our adviser support team to talk to someone directly: 0333 666 2020
- Or book a call for a convenient time at: [www.AutoEnrolment.co.uk/Talk](http://www.AutoEnrolment.co.uk/Talk)
- Review our comprehensive Knowledge Bank: [www.AutoEnrolment.co.uk/Knowledge-Bank](http://www.AutoEnrolment.co.uk/Knowledge-Bank)

**Useful tools**

- Free auto enrolment planner: [www.AutoEnrolment.co.uk/Free-Planner](http://www.AutoEnrolment.co.uk/Free-Planner)
- Pension calculator: [www.AutoEnrolment.co.uk/Pension-Calculator](http://www.AutoEnrolment.co.uk/Pension-Calculator)
- Create a customised client education video: [www.AutoEnrolment.co.uk/Video-Generator](http://www.AutoEnrolment.co.uk/Video-Generator)

**Smart Pension provides advisers and agents with a "Customised Adviser Marketing Pack" which includes:**

- Customised client letter (to save you time):
  - Reminding your clients of their auto enrolment obligations and staging date
  - Outlining why you believe Smart Pension is suitable for your client and why you have selected Smart Pension as the preferred provider for your client
- Full Smart Pension company due diligence data pack (for peace of mind):
  - Our Team – Company Management, Board of Directors, Experienced Board of Trustees
  - Key Partners – Master Trust Governance and Structure
  - Fund Selection – Investment Options and Strategy
  - Administration Platform Capability
  - Payroll Software Compatibility
  - Competitor Comparison Table – Features & Pricing
  - ICAEW Traffic Light Guide to Financial Advice (summary)
  - MAF Fact Sheet