

7.05 PENSION SCHEME ONE OFF AUTO ENROLMENT SERVICES

The purpose of this schedule and the Standard Terms of Business is to set out the basis on which we are to act as accountants and advisors with regard to the one-off work assisting you in preparing for the workplace pension automatic enrolment regime, including setting up the required records for monitoring compliance, and to clarify our respective responsibilities in respect of that work.

The ongoing work for auto-enrolment is included within the payroll schedule [7.01](#).

1 Your responsibilities

- 1.1 You will register for auto enrolment with 'the Pensions Regulator'.
- 1.2 As stated in [Key Facts](#), either you will identify and appoint an appropriate pension provider or we will assist in identifying a suitable pension provider.
- 1.3 You will be responsible for paying the initial contribution.
- 1.4 You will review the assessment of the workforce and accept responsibility for the completeness and accuracy of the assessment.
- 1.5 You will be responsible for making all the necessary communications with the workforce in accordance with the requirements and timescales of auto enrolment both at set up and on an on-going basis.
- 1.6 You will be responsible for ensuring that each employee has given permission for data to be shared for the purpose of auto enrolment in accordance with the requirements of the Data Protection Act.

2 Our responsibilities as accountants

- 2.1 You have instructed us to assist you in preparing for the auto-enrolment regime for workplace pensions, and to assist you in setting up the required records to facilitate the required reviews.
- 2.2 We will assist you in determining your 'staging date' for auto enrolment and also advise as to whether the postponement facility should be used.
- 2.3 We will introduce you to an Independent Financial Advisor (IFA) for advice regarding the set-up of your pension scheme.
- 2.4 We will assist you in identifying categories of worker; eligible jobholders, non-eligible jobholders and entitled workers.
- 2.5 We will design and assist you with the set-up of the system and records required for auto-enrolment based on the information you supply to us.
- 2.6 Where specialist advice is required on occasions we may need to seek this from or refer you to appropriate specialists.