

SET UP AND MANAGE CLIENTS WITH A SINGLE LOG IN

1. Business Adviser	
Introducer Business Name	
Registered Number eg FCA	
Address	
Key Contact Name	
Email	
Telephone No.	

2. Please set me up with: -	
I want to set up workplace pensions for my clients	tick <input type="checkbox"/>
I want to manage multiple clients	tick <input type="checkbox"/>

3. Default Fund
Salvus Governed Lifestyle model - AEGON Investment Management - Investment Adviser to Trustees is Goddard Perry Consulting using Morningstar

4. FEES: PENSION SCHEME & AE COMPLIANCE MODULE (If required) VAT will be applied to all charges as appropriate.	
• Set up of Workplace Agency	Free to introducer (unlimited employers)
• Set up of Workplace Pension	£250 (one-off charge per employer)
• Annual Scheme Administration	0.60 % Plus £0.83p per member per month (Charged within the pension scheme)



PLEASE REGISTER ME ON THE SALVUS MASTERTRUST PLATFORM

7. IMPORTANT INFORMATION

We confirm:

1. We have advised the employer of all key facts about Salvus Master Trust.
2. We agree to pay your fees as stated on set up of each employer's pension set up
3. The employer is aware that Salvus requires Gross contributions as it operates Net Pay Arrangement method of tax relief delivery.
4. That the employer is aware of our data template and has agreed to supply data in the exact format.
5. We indemnify Salvus and HS Admin in respect of any claim arising from the provision of inaccurate or incorrect data or any such claim arising from our negligence.

Compliance Module

If the employer uses our Auto enrolment compliance portal:

1. That the employer understands that the compliance Module is available without additional charge for employers who wish to use it.
2. Use of the compliance module is dependent on the employer submitting data on a timely basis and access can be revoked if the employer falls behind in its duties.
3. Additional fees could be incurred if errors are made and database entries have to be undone.

We also confirm our compliance with the Data Protection Act 1998 and as such access to employee's personal information shall be limited to use in the context of Auto Enrolment, Payroll and pension scheme maintenance We further confirm that we will fulfil our obligations under the Money Laundering Regulations 2007 and have completed the relevant corporate client due diligence in respect of all of our clients.

Name

Position

Date

Email the completed document to newbusiness@salvustrust.com

