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Prism Employee Benefit Consultants' - 'simple steps' approach to auto-enrolment has been developed by our advisers with over 25 years experience in the employee benefits market, working closely with businesses of all sizes to meet their needs and obligations.

We can take over your scheme or establish a new one. We can implement and manage a range of benefits for your staff and make sure you take all the necessary steps to meet your auto-enrolment obligations in a timely and cost-effective manner. Do not assume any current scheme will fulfil your requirements – it should be reviewed.

Our service consists of 'simple steps' to help you meet your obligations. Before we take these steps together, it is essential that we understand your business and you understand ours. We will arrange an initial meeting to establish how we can develop a working relationship to benefit your business.

This meeting will be without cost or obligation and will focus on:

- **Identifying your aims, objectives, priorities and budget.**
- **Explaining the essential issues, such as the effect of current pension legislation on your business.**
- **Detailing our service steps, options and fees.**

Once we receive your instructions we then undertake the following steps:

## Step 1: Consultancy & Proposal Report

We will produce and present a document that:

- **Summarises the facts we have obtained.**
- **Highlights your aims, objectives, priorities and budget.**
- **Details specific obligations for your business to your workforce.**
- **Details the full costs to your business based on your payroll.**

We can consult with your staff to identify options that can form part of your solutions. Outline potential solutions and their implementation. Draft a structured plan to meet your staging date obligation. Provide a review summary on any products and services already in place. Produce a detailed summary of initial and on-going servicing as required. Subscribe you to our 'auto-enrolment service' to ensure you are well placed to meet your staging date obligations and other regulatory requirements.

Fixed fee £400 + VAT

Once we have agreed a plan to take forward and a timescale suitable for your business we will move to: STEP 2

“ Prism EBC have supported us for several years and worked with us to implement new employee benefits for our staff. Their team continue to support our Management in meeting our auto enrolment obligations. In addition our employees are provided with clear support and advice to help them understand and value the employee benefits we offer. ” **Veritek Global**



## Step 2: Research & Recommendation Report

We will appraise any current plans you may have in place and consider these in making our recommendations. We will identify a suitable provider offering solutions tailored to your needs. This is best undertaken within 4 months prior to your chosen commencement date. We will outline an implementation plan. We will include information supporting our recommendations and specific illustrations together with material from our recommended provider(s).

In addition we can recommend methods that can be utilised to mitigate your overall costs and improve tax efficiency.

Fixed fee £600 + VAT

## Step 3: Establishment Service

We will provide resources to deliver information to your employees on the benefits you are implementing. We can undertake presentations and one to one meetings as required. This can ensure employees are given every opportunity to understand and value the benefits you are offering, and are able to see how any personal arrangements could be affected. Alternatively we can post and email information to employees and offer telephone support as required. We can also liaise with the chosen provider to assist those responsible in your business for maintaining the arrangements.

Fees are calculated based on the time to implement your scheme and agreed in advance.

## Step 4: On-going Service

We appoint a Consultant dedicated to your scheme backed by our experienced administration team. We undertake an annual review meeting with the Management team responsible for your benefit administration. We will produce an annual summary to include management information, document scheme processes and an investment appraisal to assist you in complying with your new 'governance' obligations. An annual review service to employees is available on a fee basis as required. On-going telephone employer and employee support, with an annual time allowance. Service fees are agreed from commencement, then fixed and reviewed annually. Fees are based on a cost per employee basis and collected monthly.

Our fees are £2 - £5 per member per month + VAT. Larger schemes qualify for discounted rates.

\*Additional adviser fees may apply.

Other Services:

- *New Employees – We are pleased to meet or speak with new eligible employees. This can be undertaken on a 1 to 1 basis or as group presentations. Fees apply.*
- *We make no charge for providing options to leaving members.*

For further information or to book a free initial meeting contact Geoff Fillery or Lisa Paston on 0800 970 8800. Alternatively please visit our website at [www.prismebc.co.uk](http://www.prismebc.co.uk)

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*We are pleased to offer a full suite of financial services to members with a free initial no obligation meeting with an appropriate Adviser. Thereafter services are subject to Prism EBC Ltd's Client and Service Agreements.*

Archer House, Britland Estate, Northbourne Road, Eastbourne BN22 8PW  
T: 0800 970 8800      [www.prismebc.co.uk](http://www.prismebc.co.uk)

**Prism** employee  
benefit  
consultancy

Prism Employee Benefit Consultancy is a trading name of Prism EBC Ltd. which is authorised & regulated by the Financial Conduct Authority.  
Registered in England and Wales No. 9171884



**Select Service Proposition** - for employers who can undertake some of the initial and ongoing automatic enrolment process “in house” or via their payroll provider.



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We can consult with your staff to identify options that can form part of your solutions. Outline potential solutions and their implementation. Draft a structured plan to meet your staging date obligation. Provide a review summary on any products and services already in place. Produce a detailed summary of initial and on-going servicing as required. Subscribe you to our ‘auto-enrolment service’ to ensure you are well placed to meet your staging date obligations and other regulatory requirements.

Fixed fee £400 + VAT

Once we have agreed a plan to take forward and a timescale suitable for your business we will move to: STEP 2

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## Step 2: Signpost Provider

We will identify a scheme provider and automatic enrolment operating system which will work with your payroll software / bureau. This is based on you undertaking the workforce assessment per pay period and uploading suitable data to the provider's portal. You can then access the provider's communications and administration tools to operate your scheme.

Fee £300 + VAT

## Step 3: Establishment & Communication Service

### Establishment

You can choose to set-up your scheme on-line using the simple provider tools at no cost. If however you require us to set the scheme up on your behalf we charge a fee of £150 + VAT.

### Communications

We will provide packs for your employees, delivering information on the arrangements you are establishing which will include provider information, investment details and relevant contact details. We offer employer and employee initial support by telephone and email for your first staging month. Minimum Fee £250 + VAT.

We can also deliver presentations to ensure employees are given every opportunity to understand and value the benefits you are offering and to see how any personal arrangements could be affected. Presentation fees start at £250 + VAT per session based on 1 session up to 15 attendees. Additional fees may apply for presentations outside the TN or BN postcode areas.

Additional sessions can be arranged as well as one to one meetings if required – additional fees apply.

## Step 4: On-going Service

We appoint a Consultant dedicated to your scheme backed by our experienced administration team. We will produce an annual review summary to assist with your scheme 'governance' obligations. We continue to support your business and employees with an annual time allowance per scheme. Service fees are agreed from commencement, then fixed and reviewed annually. Minimum Monthly Fee £75 + VAT.

### Other Services:

- *New Employees – We are pleased to meet or speak with new eligible employees. This can be undertaken on a 1 to 1 basis or as group presentations. Fees apply.*
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