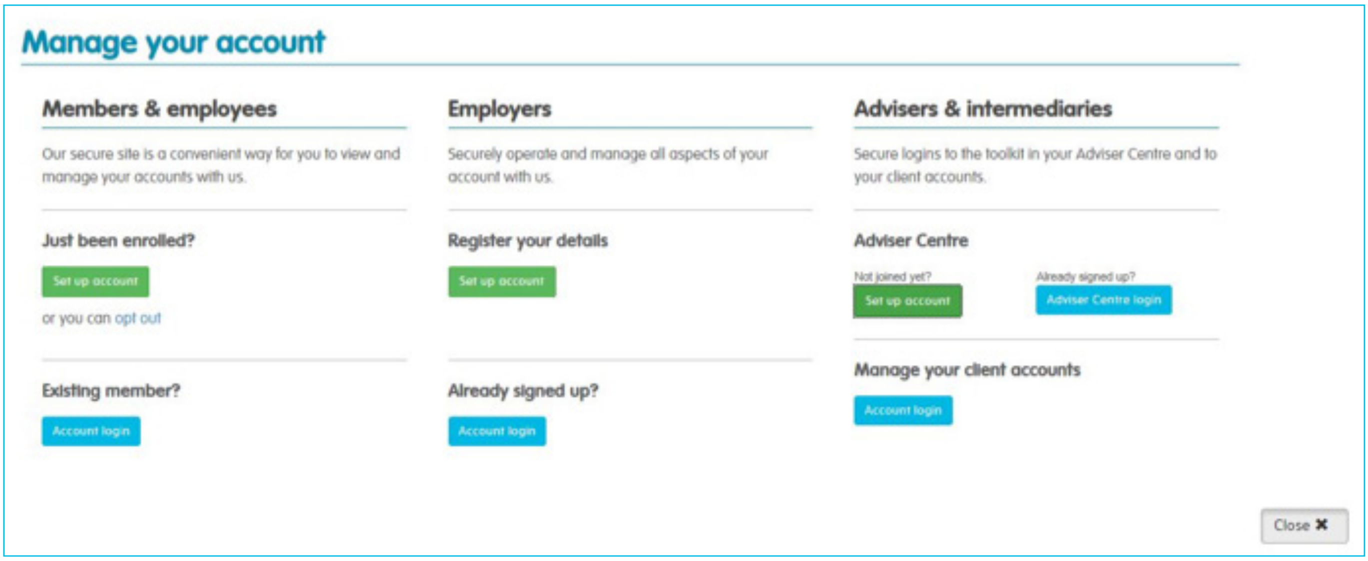
The Adviser Centre

The Adviser Centre is our online tool to help you manage your partnership with The People's Pension. You can access the adviser toolkit, sign up new clients and share your reduced charge code with your customers. You'll also be able to download guides and other useful documents which may help both you and your clients.

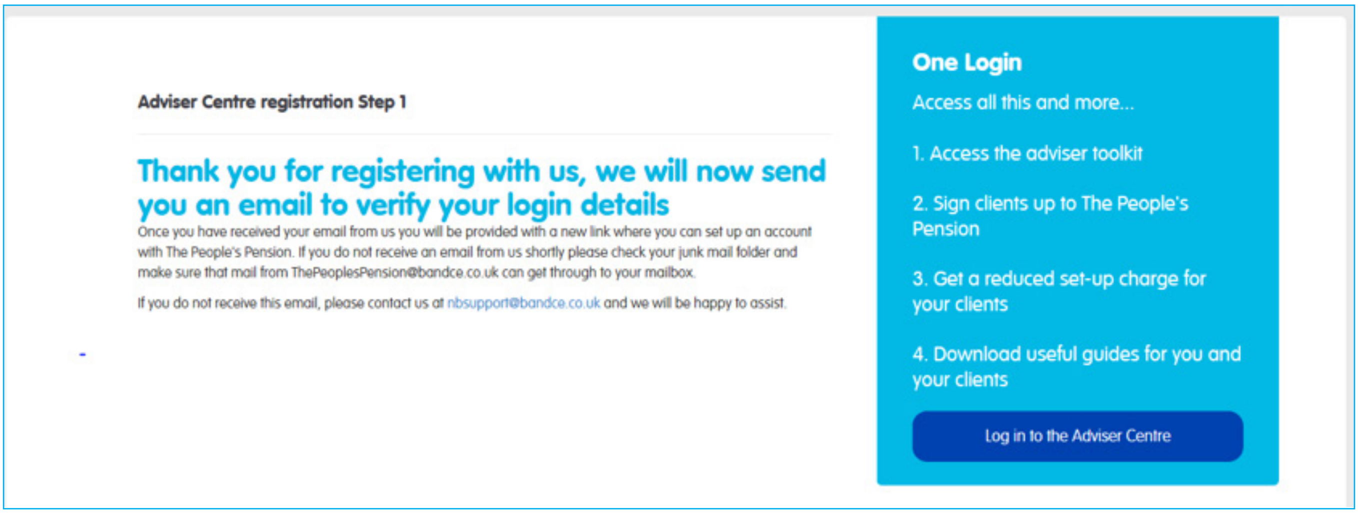
Profit for people

You can access the Adviser Centre through our website **www.thepeoplespension.co.uk**.

Select the 'Manage account' button in the top right corner. If you've registered with Online Services or the Adviser Centre before, you can log in here. If you're not registered, select 'Set up account'.



When registering for the first time, we'll ask you for some basic personal details, including your email address. Then we'll send you an email – please click on the link to complete your registration for the Adviser Centre.

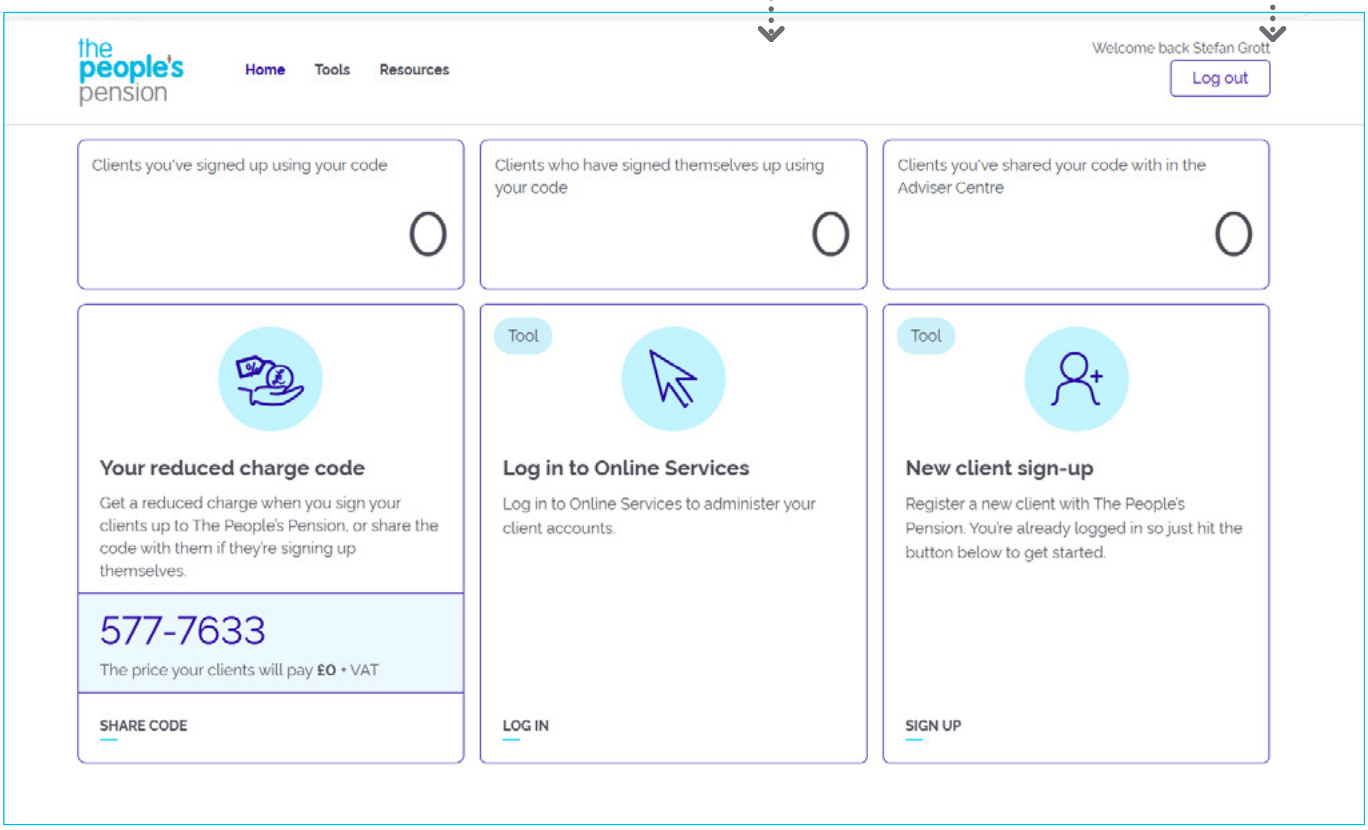


If you've previously registered with us you'll receive an email confirming this. You can then log in using your existing details.

After you've logged in you'll see the Adviser Centre home page.

If you click on resources you can view and download a variety of user guides, investment fund guides and other useful documents.

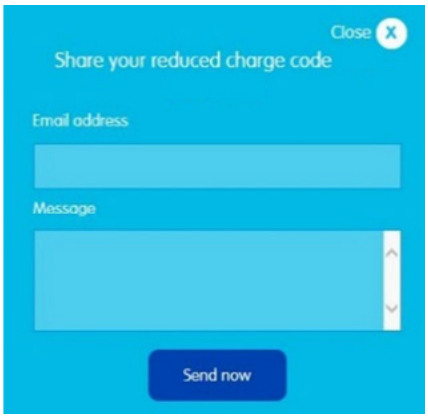
After you've finished using the Adviser Centre, you can 'Log out'.



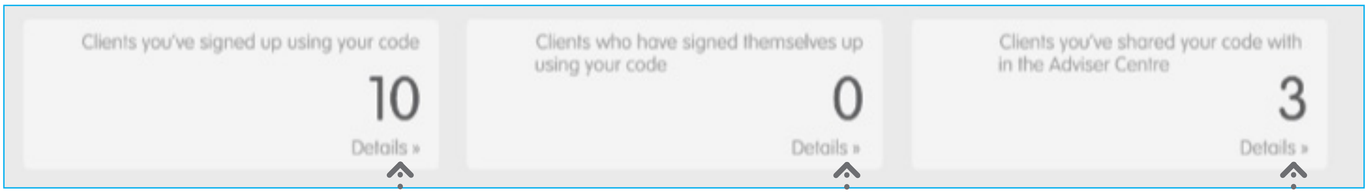
You can share your reduced charge code with your customers. Click 'Share code', enter the email address of the person you want to send your code to, add a message and click 'Send now'.

You can see all your existing accounts you've previously signed up with us by logging in to Online Services.

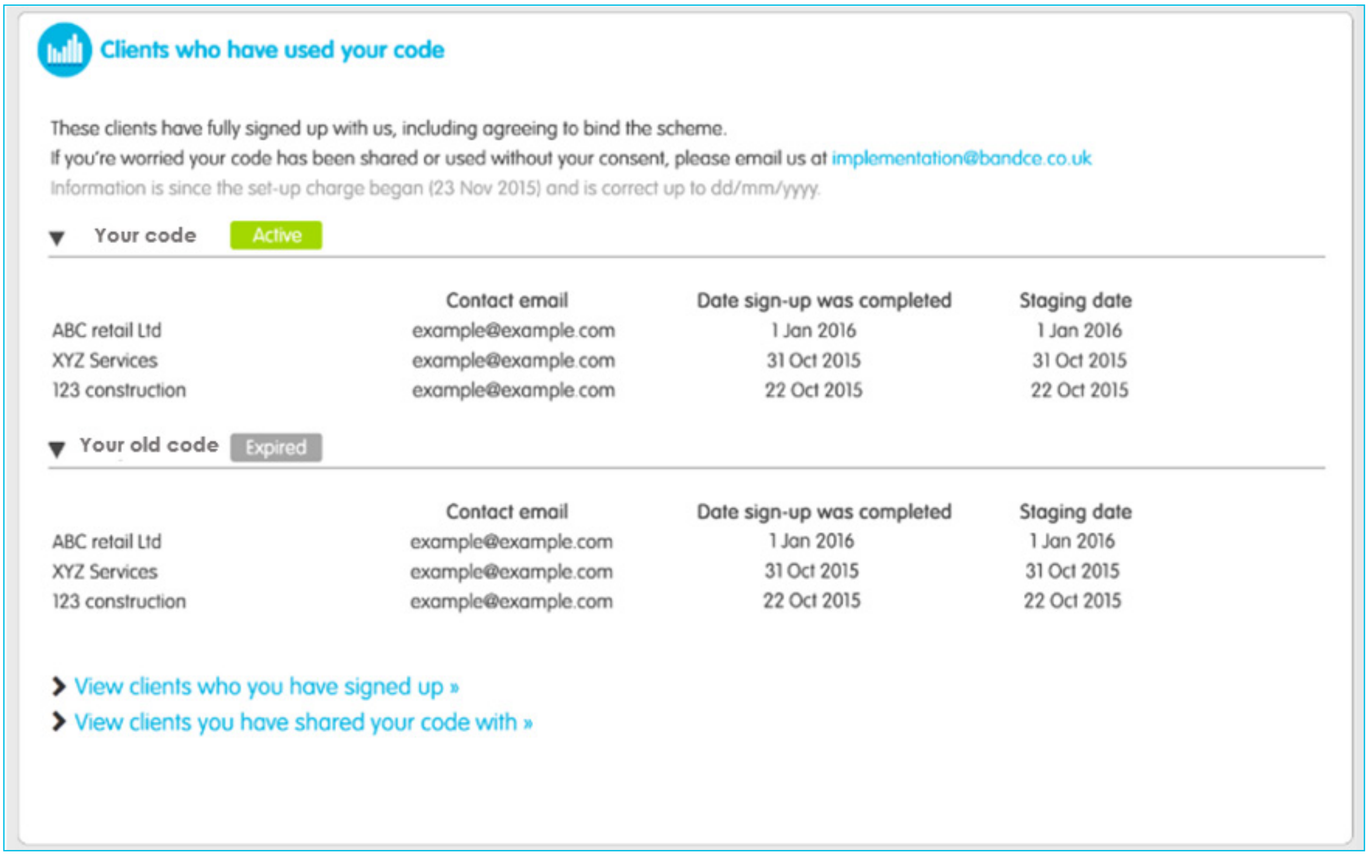
You can sign up new customers to The People's Pension by clicking 'Sign up'.



At the top of your home page we'll tell you about how your reduced charge code has been used.



Click 'Details' for more information about which clients have used your code – either when they've signed up themselves or when you've signed them up.



Clients who have used your code

These clients have fully signed up with us, including agreeing to bind the scheme.
If you're worried your code has been shared or used without your consent, please email us at implementation@bandce.co.uk
Information is since the set-up charge began (23 Nov 2015) and is correct up to dd/mm/yyyy.

▼ Your code Active

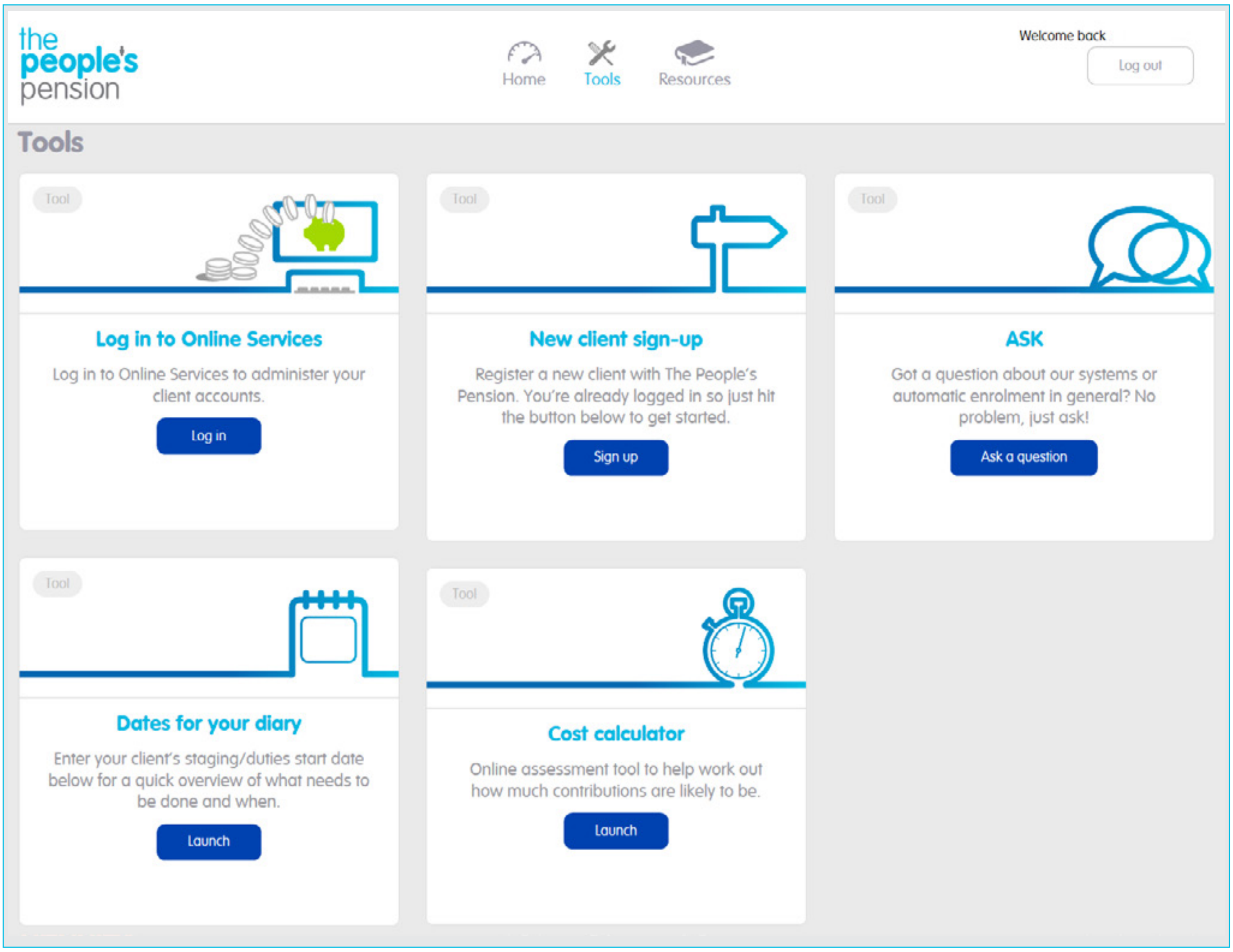
	Contact email	Date sign-up was completed	Staging date
ABC retail Ltd	example@example.com	1 Jan 2016	1 Jan 2016
XYZ Services	example@example.com	31 Oct 2015	31 Oct 2015
123 construction	example@example.com	22 Oct 2015	22 Oct 2015

▼ Your old code Expired

	Contact email	Date sign-up was completed	Staging date
ABC retail Ltd	example@example.com	1 Jan 2016	1 Jan 2016
XYZ Services	example@example.com	31 Oct 2015	31 Oct 2015
123 construction	example@example.com	22 Oct 2015	22 Oct 2015

› View clients who you have signed up »
› View clients you have shared your code with »

Select 'Tools' at the top of your adviser home page.



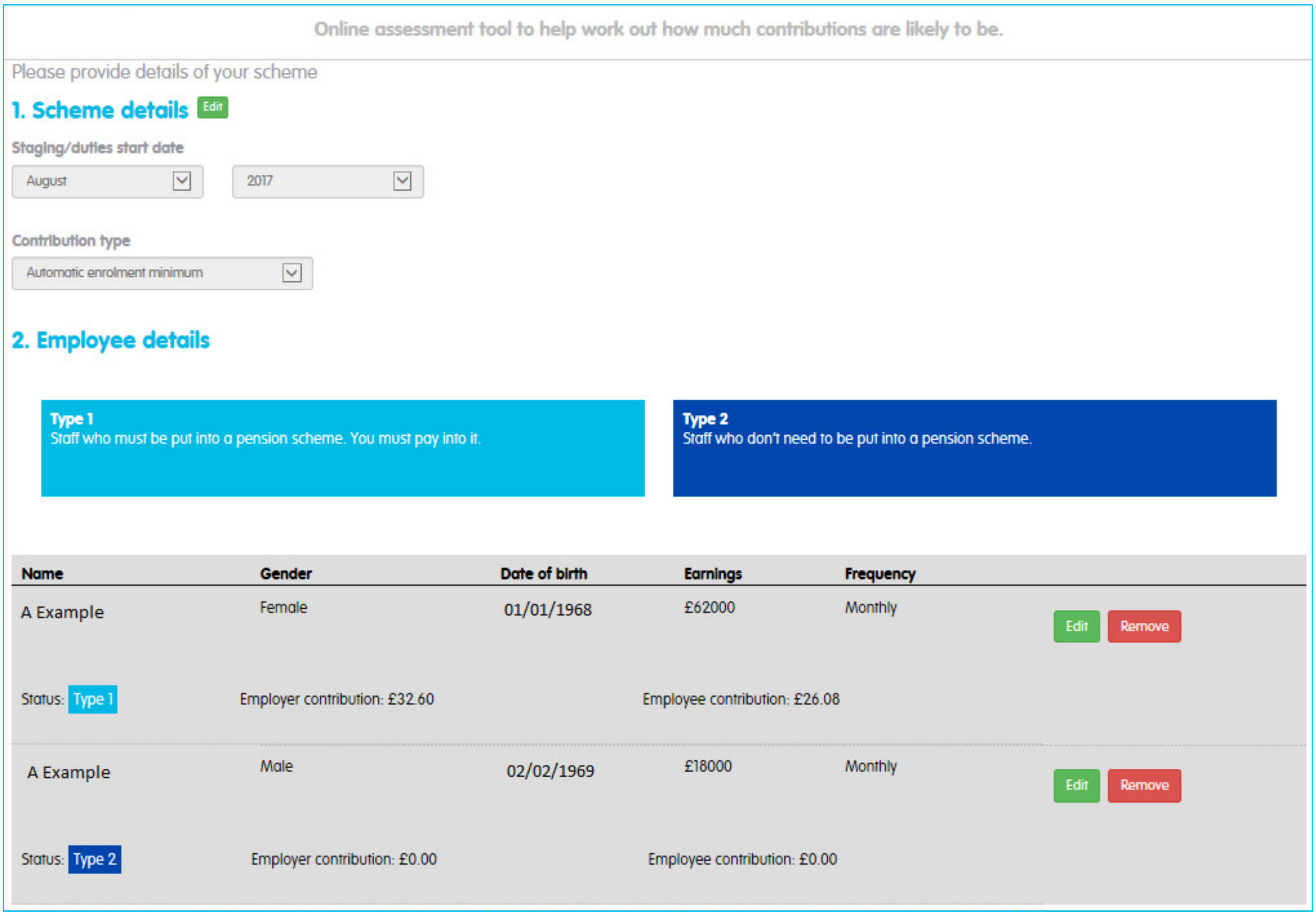
Tell us your client's staging/duties start date and we'll provide you with a timeline explaining:

- **when they need to choose a provider**
- **when they need to notify their employees**
- **when they need to declare their compliance with The Pension's Regulator.**

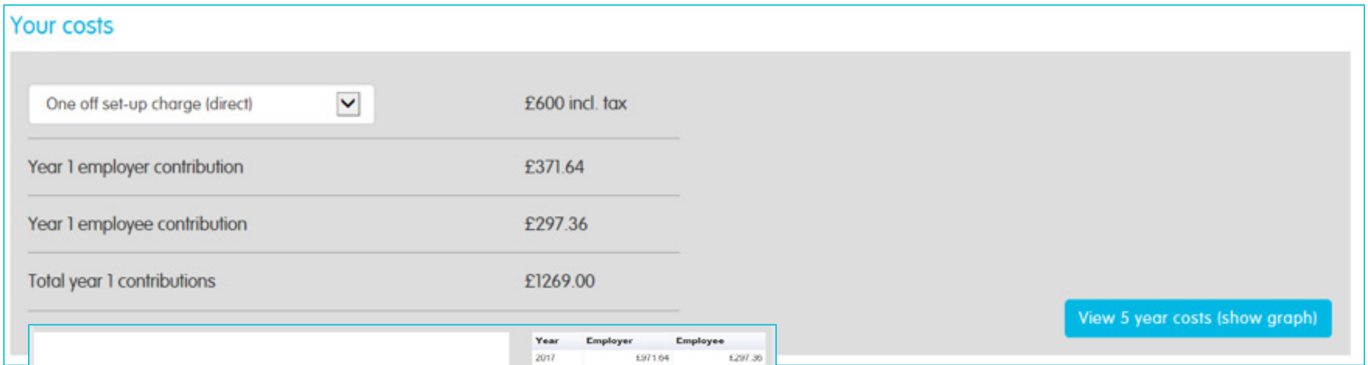
The automatic enrolment calculator will help you work out how much automatic enrolment will cost your clients over the next few years and help them budget for this. We'll explain more on the next page…

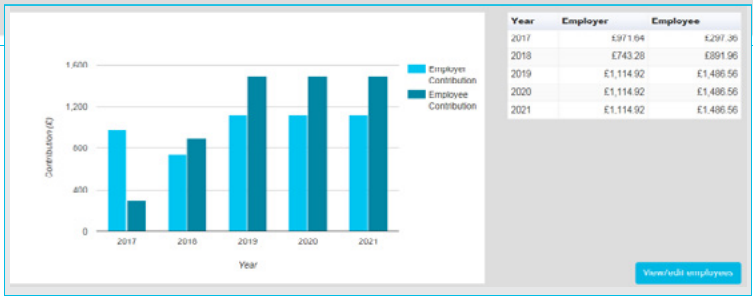
Automatic enrolment calculator – how much will it cost your clients?

We'll need you to tell us their staging/duties start date. If contributions will be made based on the regulatory minimum you can select 'Regulatory' – if not, choose 'Self-select' and tell us how much employee and employer contributions should be.



Employee details can be added here — we'll need their date of birth, pay amount and frequency. Then click 'Save'.





Once you've added an employee we'll show you how much automatic enrolment will cost your client.

Select 'View 5 year costs' to see a graph showing the cost of automatic enrolment over the next 5 years (based on the employee's details provided).

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BR TPP 0077.0625