

OPT-IN PENSION SCHEME ENROLMENT LETTER

Scheme Name: _____ Member Reference No: _____

Member Details:

Full Name: _____

National Insurance Number: _____

Date of Birth: _____

Employer Details:

Employer Name: _____

Employer PAYE Reference: _____

Scheme Information:

Scheme Administrator: _____

Scheme Reference Number: _____

1. Introduction

This letter confirms your enrolment into the Employer's Opt-In Pension Scheme, administered in accordance with the Pension Schemes Act 1993 and all applicable UK legislation. Your participation is subject to the terms and conditions set forth herein.

2. Eligibility and Membership

You are eligible to join the Scheme as a member upon opting in under the applicable auto-enrolment rules. Membership is voluntary and commences once your enrolment form is received and processed by the Scheme Administrator.

3. Contributions

You and your Employer will make pension contributions in accordance with the Scheme rules and statutory requirements. Contribution rates and payment schedules are detailed in the Scheme booklet and may be amended subject to statutory guidelines.

4. Scheme Benefits

The Scheme provides retirement benefits as defined in the Scheme documentation. Benefits may include lump sum payments, annuities, or other pension benefits subject to Scheme rules and HMRC regulations.

5. Investment of Contributions

Contributions paid by you and your Employer will be invested in accordance with the Scheme's investment policy. You may have options to select your investment preferences as set out in the Scheme literature.

6. Opt-Out and Cessation of Membership

You have the right to opt out of the Scheme within the statutory period following your enrolment. If you choose to opt out, your contributions will be refunded in full by the Scheme Administrator. Membership may also cease upon leaving employment or in accordance with Scheme rules.

7. Data Protection

Your personal data will be processed and stored securely in compliance with the UK Data Protection Act 2018 and the

General Data Protection Regulation (GDPR). Your data will only be used for Scheme administration and legal compliance.

8. Scheme Rules and Amendments

The Scheme is governed by a formal Trust Deed and Rules, which may be amended from time to time as permitted by law. You will be notified of any significant changes affecting your membership or benefits.

9. Complaints and Dispute Resolution

If you have any complaints regarding the Scheme, you should contact the Scheme Administrator. Unresolved disputes may be referred to The Pensions Ombudsman as per statutory procedures.

10. Governing Law

This Scheme and your membership shall be governed by and construed in accordance with the laws of England and Wales.

11. Acknowledgement

By signing below, you confirm that you have received and understood the terms of your enrolment into the Pension Scheme and agree to be bound by the Scheme Rules and applicable legislation.

MEMBER SIGNATURE

EMPLOYER SIGNATURE

Signature: _____

Signature: _____

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