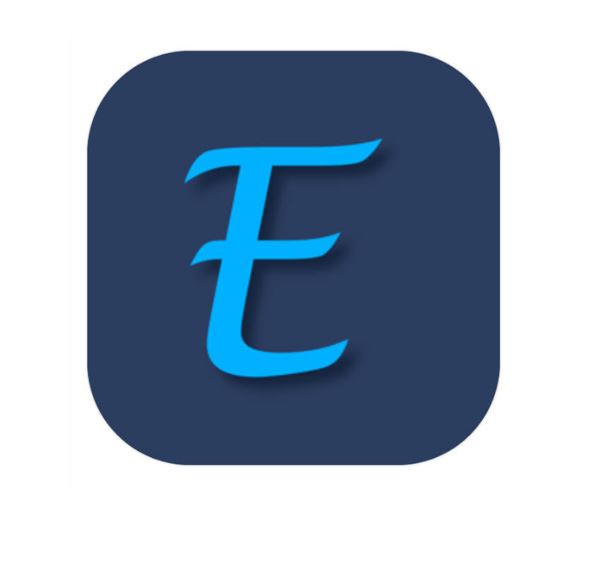


Digital Pension Support for employees

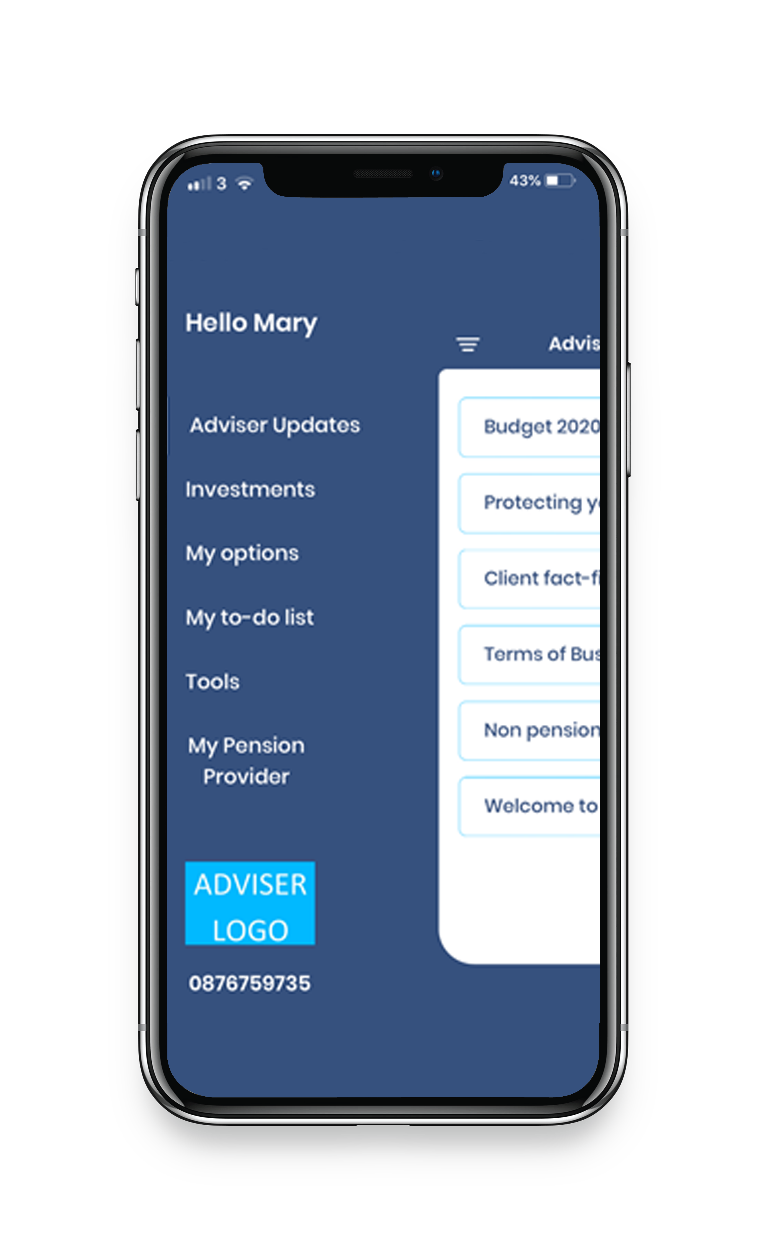
*Brought to you by* ***XXXXXX (Adviser name)***

# At XXXXXX (Adviser name) we believe in providing the very best of service to the employees of the pension schemes that we manage.



**In our years of experience, we have found that many events occur during the scheme year that employees don’t get to hear about until the next renewal meeting, when it is too late to take action. This is why we are now providing all staff access to the Engage App.**

**Engage provides employees with user friendly pensions information, videos, links, articles of interest along with the facility to access your adviser at any time throughout the scheme year.**



**Employee App Features**

**Click to call**

**ADVISER LOGO**

ADVISER

LOGO





**Access to you adviser when you need it**

**Search for lost pensions facility**

**Check your risk tolerance**

**Request a fund switch**

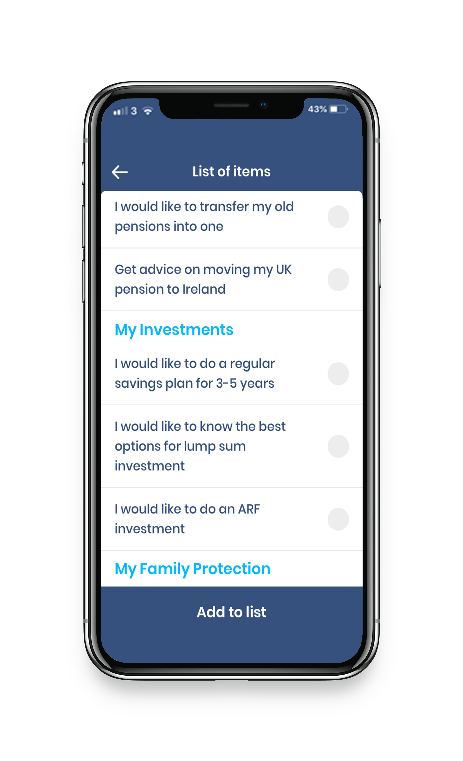
**Login into your pension’s providers portal**

**Videos and tools**

**Regular adviser updates**

**Financial to do list**

**Send tasks to your adviser**

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**NOT SURE WHERE TO START?**

The interactive to do list will suggest the steps you should take to help manage your pension and finances

**Including…**

Finally track down old pensions

Ensure you are maximizing tax relief

Ensure you have the best protection rates

Tax relief on income protection

Find the best savings options

Get the best return on investments

Add your own tasks and we will action them

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Tasks are sent automatically to your adviser who will be in contact to action them

**EMPLOYEE ENGAGE APP**

**Frequently Asked Questions**

## What is the Engage App?

Engage is an employee smartphone application provided by your adviser designed to help staff engage more with their pension scheme.

The Engage App allows the adviser to communicate with staff not just at renewal but throughout the year on important matters such as volatility in stock markets, close to tax deadline, when to consolidate old pensions etc.

The App provides a host of useful pension information, videos, links etc. to enhance the value that staff get from the scheme.

## Is the App available to all scheme members?

Yes, all scheme members, (including ex staff) can access the App once they are members of the pension scheme (active or deferred). Your adviser will provide you with your access code.

## Is staff data stored on the App?

No employee data is stored on the App. There is no threat to data security or any GDPR implications should a staff member lose the phone device.

## What are the benefits to HR of staff using the App?

In addition to reducing HR queries, the App significantly increases staff engagement, value, and appreciation that staff have for the pension scheme. As staff can now communicate with their adviser throughout the year, they get more from the pension scheme, improve their finances, and help reduce financial stress.

## Are there disadvantages to staff if they don’t use the App?

If you decide not to use the App will still have the opportunity to discuss your pension at the annual review meetings which will happen as usual. There may be communications throughout the year sent out to App users which we may not be able to send by post /email. You could therefore miss some important communications or opportunities.



## How do I get started?

Simply e-mail download the App from the Appstore or Google Play Store:

* Register using the code that we provide you with
* You’re all ready to go