



## How AE in a Box helps the Accountant

Simply put the State can't afford to support everyone in retirement anymore as people are living longer. There just aren't enough people working to support the number of people in retirement and that situation is only going to continue. Auto enrolment is part of a government initiative to increase private retirement savings. As part of the Pensions Act 2008, all eligible employees must be automatically enrolled into their company pension.

When each employer has to comply by this new legislation it is based on the total number of people in the employers PAYE scheme and it's called your staging date. The theory sounds straightforward enough, whether or not you agree with it. The implementation however, is far from simple.

The Pensions Regulator is contacting each and every employer to let them know when their staging date is, and has set up a website to help. This website refers employers to their Accountants as the first port of call for asking for help.

This means that between now and 2017 accountant will be inundated with calls from clients asking for help with their auto enrolment needs. The majority of accountants we've spoken too are not geared up to deal with this, nor do they necessarily have a desire to.

AE in a Box pre-empts all of these calls from your clients. It's a consultant in a box designed to make the process of complying with the new rules as straight forward as possible

It's an employer's own tailor made consultant in a box:

- ✓ Pension Guidance
- ✓ Project Management
- ✓ Certification calculator
- ✓ Auto Enrolment tasks timeline / diary



- ✓ 'Ask the regulator'
- ✓ Employer support
- ✓ And more

**It's the accountant's solution to the Auto Enrolment avalanche. Just load your clients name, email address and payroll number into the system. Each one of your clients will then receive an email outlining what Auto Enrolment is, why it will affect them, and what they can do to start dealing with these new laws.**

**The information you upload is not used for any other purpose but to send out correspondence regarding Auto Enrolment.**

**It will send out reminders to clients who haven't taken action yet through AE in a Box when their staging date is 9 months out.**

**As the accountant, you'll have access to Management Information letting you know which of your clients have signed up and which have chosen not too. You'll also have access to those clients who have signed up and which ones are up to date with their tasks, and which have overdue tasks outstanding.**

**If you're working with your financial adviser you can then ask your adviser if they'll contact the employers who are falling behind with their auto enrolment tasks, and step in to help them get up to date. Alternatively the system allows you to give access to your financial adviser directly so they can manage this fully on your behalf.**

**If you don't have a financial adviser, but would like to work with one who is prepared to help your clients with their Auto Enrolment tasks, then you'll find a link to local advisers in your area.**

**As an accountant you get to proactively offer a full solution to your clients regarding auto enrolment, without having to field all the individual enquiries from each client and without having to do the work, the system manages it all for you, so you can continue to deal with the client work you'd like to.**