



How AE in a Box helps Financial Advisers

Whether you're looking to help your clients directly with their Auto Enrolment needs, work with your professional introducers to help them and their clients with their AE needs, or if you're looking to go out and make new professional connections and want to use AE as your in, then AE in a Box has been designed with you in mind.

Have a simple Auto Enrolment solution to offer

It's a hands off approach that delivers a "consultant in a box" designed to make the process of complying with the new rules as straight forward as possible using software as opposed to man power to deliver guidance.

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
- ✓

How AE in a Box can help you:

- Build more professional connections
- Connect with directors and business owners
- Increase your earnings

Build more connections with professionals

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 accountants 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.

By approaching your chosen accountants and other professional contacts with AE in a Box you can pre-empt all these calls and show them how to deal with Auto Enrolment for their clients without it becoming a headache for them.

The accountant/professional connection just loads their clients name, email address and payroll number into the system. Each one of their 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 they 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.

Your accountant/professional connection will then have access to Management Information letting them know which of their clients have signed up and which have chosen not too. They'll also have access to those clients who have signed up and which ones are up to date with their tasks, and which have over due tasks outstanding.

You will get Management Information that lets you know how many of each of your accountants/professional connections clients are over due on their tasks so that you can go back to your professional connection on a monthly basis and offer to help their clients who are behind schedule. This gives you the opportunity to have regular contact with your professional contacts, both new and established and build on that relationship.



Everything you need to prepare & comply with Auto Enrolment in one place

Connect with directors and business owners

This Management Information reports are the perfect opportunity to be able to reach out to new business owners and directors and start forming a meaningful working relationship with new prospects.

If you have a strong enough relationship with your accountant/professional connect the systems allows them to give access to you full access directly to all of their clients who have signed up including those who are running behind schedule.

Increase your earnings

The employer pays just £29/month (exc VAT) and AE in a Box will rebate back to the introducer the below amounts depending on the number of employers who sign up. You can then choose how much of this rebate you'd like to share with your professional connections.

Example Revenue

If you sign up 3 accountants each with 150 clients who sign up to AE in a Box

Rebate amount £5.80 x 450 = £2,610 pm or £31,320 pa

If you sign up 2500 clients through your connections

Rebate amount £10.15 x 2500 = £25,375 pm or £304,500 pa

Professional

Rebate Bracket	Monthly Rebate Amount Per Client
Number of clients 1 – 999	£5.80
Number of clients 1000+	£10.15