



COMPANY PENSION PLAN

Matched and tiered contributions form

1 Important information

Please read this section carefully before completing this application form.

- This form should be completed by the trustees.
- Please use BLOCK CAPITALS and black ink when completing this form.
- Within this application form we'll use the term "scheme". When we refer to this, you'll need to complete information about your company pension scheme.
- If you're applying a matched contribution structure to only the regular contributions within your company pension plan, you should complete sections 2, 3 and 6.
- If you're applying a matched contribution structure to both the regular contributions and the additional voluntary contributions (AVCs) or only the AVCs within your company pension plan, you should complete sections 2, 4 and 6.
- If you're applying a tiered contribution structure to your company pension plan, you should complete sections 2, 5 and 6.
- Please complete a separate form for each category within your company pension plan.
- If you have any queries when completing this form, please speak to your Implementation Manager. You should keep a copy of this form and any additional forms you send to us. You can request a copy of this completed application form from us at any time.

2 Your company pension scheme details

Please complete this section with your company pension scheme details.

Name of your
company pension scheme

Name of category

3 Matched contribution details

Please complete this section with the matched contribution details for your company pension plan.

What's the maximum member contribution that you'll match? (This may also be the maximum employer contribution that you'll make to this company pension plan). %

What's the minimum member contribution that needs to be made to the company pension plan if the contributions are to be matched? (If any members contributions are below this amount, contributions will not be matched). %

What will be the employer contribution if the member does not pay the minimum contribution needed for matching? %

Please complete the table below with the matched contribution details for both you and the members within your company pension plan. If you're setting your contributions up as:

- a ratio, you'll need to complete the Member contributions column and the Employer ratio column;
- a flat rate, you'll need to complete the Member contributions column and the Employer flat rate column.

The examples within the table below will help show how to complete the table for each of the matching bands available.

If there are more than 6 matched contribution bands within your company pension plan, please tick this box and provide the details on a separate piece of paper which should be signed, dated and attached to this form.

Number of matching bands	Member contributions		Employer ratio	Employer flat rate
	Lower member contribution rate %	Higher member contribution rate %	Member % : Employer %	Flat rate %
Example 1	2.00	2.99	1 : 1.25	
Example 2	3.00	3.99		2
1				
2				
3				
4				
5				
6				

4 Matched contribution details – Additional voluntary contributions

Please complete this section with the matched contribution details and the additional voluntary contribution details for your company pension plan.

If the same matching of contribution structure you're applying to your regular contributions is also being applied to your additional voluntary contributions you don't need to complete this section.

Please complete the table below with the matched contribution details for both you and the members within your company pension plan. If you want to set your contributions up as a ratio, you should complete the Member contribution columns and the Employer ratio column. If you want to set your contributions up as a flat rate, you should complete the Member contribution columns and the Employer flat rate column. The examples below show how the table should be completed for each of the matching bands available.

If there are more than 6 matched contribution bands within your company pension plan, please tick this box and provide the details on a separate piece of paper which should be signed, dated and attached to this form.

Number of matching bands	Member contributions		Employer ratio	Employer flat rate
	Lower member contribution rate %	Higher member contribution rate %	Member % : Employer %	Flat rate %
Example 1	2.00	2.99	1 : 1.25	
Example 2	3.00	3.99		2
1				
2				
3				
4				
5				
6				

5 Tiered contribution details

Please complete this section with the tiered contribution details for your company pension plan.

You'll need to tell us how the contribution tiers are to be set up within your company pension plan. Are they based upon:

Member's age

Length of time members are in the company pension plan

Length of time members are within your employment

If there are more than 6 matched contribution bands within your company pension plan, please tick this box and provide the details on a separate piece of paper which should be signed, dated and attached to this form.

Number of contribution tiers	Tiering range (years)	Member contribution (% or £ gross)	Employer contribution (% or £)
Example 1	1 – 2	3	3
Example 2	3 – 5	3	6
1			
2			
3			
4			
5			
6			

6 Your signature

Please sign and date.

Signed for and on behalf of the trustees.

Signature

Date



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