



# GROUP PERSONAL PENSION PLAN & GROUP STAKEHOLDER PENSION PLAN

## Matched and tiered contributions form

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### 1 Important information

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**Please read this section carefully before completing this application form.**

- Please use BLOCK CAPITALS and black ink when completing this form.
- If you're applying a matched contribution structure to your group pension plan, you should complete sections 2, 3 and 5.
- If you're applying a tiered contribution structure to your group pension plan, you should complete sections 2, 4 and 5.
- Please complete a separate form for each category within your group pension plan.
- If you need help 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.

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### 2 Your group pension plan details

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**Please complete this section with your group pension plan details.**

**Name of your  
group pension plan**

**Name of category**

### 3 Matched contribution details

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

 %

What's the minimum member contribution that needs to be made to this group 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 in your group 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 group 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 Tiered contribution details

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

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

Member's age

Length of time members are in the group pension plan

Length of time members are in your employment

If there are more than 6 matched contribution bands within your group 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			

## 5 Your signature

Please sign and date.

Signed by the employer/group pension plan sponsor.

Signature

Date



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