

## Set up and instruct a regular contribution (Employer)

Regular contributions can be made into Pensions monthly. Payments are to be made via bank transfer or standing order instructed from the company, with Platform expectations set on the 1st, 7th, 14th, 21st, or 28th of each month.

Regular investments can be invested automatically into a model or funds. They can also be left in cash.

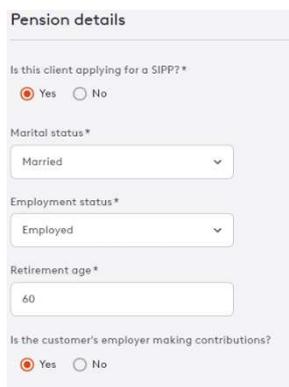
To successfully set up a regular employer contribution, you will need to ensure that the client's employment details are entered, that the expectation is set up, and that the Regular Employer Contribution Agreement is completed and provided to the YOUR Platform team.

### Step by step

- Setting up employer contributions requires a form to be completed by the client's employer, this form is found on the Investor Forms section of the YOUR Platform website. This should be returned to [Questions@YOUR-Platform.co.uk](mailto:Questions@YOUR-Platform.co.uk) once complete.



- To ensure the client is able to set up employer contributions, access the client, click on 'Client details' and confirm that under the 'Pension details' section "Applying for SIPP" is set to Yes and then that 'Marital status', 'Employment status', and 'Retirement age' are entered and correct.

A screenshot of a web form titled "Pension details". It contains several fields: "Is this client applying for a SIPP?\*" with radio buttons for "Yes" (selected) and "No"; "Marital status\*" with a dropdown menu showing "Married"; "Employment status\*" with a dropdown menu showing "Employed"; "Retirement age\*" with a text input field containing "60"; and "Is the customer's employer making contributions?" with radio buttons for "Yes" (selected) and "No".



- Ensure the 'Yes' is ticked to whether the employer will make contributions and also that the next section of 'Employer Details' including bank details and address is also fully completed and correct.
- To update or complete any of these sections you can click on the orange 'Edit' option at the right of the client details.
- Return to the client's main screen and access the required account.
- Once in the account, click on the 'Account actions' button at the top right, then choose 'Pay in' from the drop-down options.
- Under 'Payment type', select the 'Regular payment' option and you will be shown the 'Regular payments' section, any existing payments will be shown here.
- Click the '+ Add payment' button (or complete the first row if this is the first payment stream). Select Employer in the Payment type and enter the amount.
- As the client will be paying by bank transfer (Direct Debits are not allowed for employer contributions), you will need to select an appropriate payment day. If the client would like to pay on a different date than any of the 5 options available, select the date as the closest date before that. For example, if the client wanted a payment on the 5<sup>th</sup>, select the 1<sup>st</sup>. For a payment on the 20<sup>th</sup>, select the 14<sup>th</sup>.

### Regular payments

In progress

**Employer regular contribution agreement needs to be completed**

	Payment day *	Payment type *	Amount *	Amount (gross)	Payment method *	
Payment 1	7th	Employer	£	£0.00	Bank Transfer	Remove

- Select whether you would like to auto-invest the cash by choosing Yes or No.
- Where the account is invested in a model, this will align to the model.
- Where the account holds funds outside of a model, choose any funds to invest the payment into and allocate the amount as a percentage to each fund.
- Once happy, click 'Review' and check the details you have entered. Click 'Submit' to confirm.
- Payment details will need to be provided to the client/employer to set up the payment. These will show on the confirmation screen once 'Submit' has been clicked.