

For accountants, bookkeepers, payroll administrators and other business advisers.

Auto-enrolment letter, email and Twitter templates

Helping you contact clients and prospects about
automatic enrolment



Take hold of the auto-enrolment opportunity

If you're an accountant, bookkeeper, payroll administrator or other business adviser, the time is ripe for contacting clients about auto-enrolment.

Between now and the end of 2017, the new workplace pension regulation will affect hundreds of thousands of small and micro employers. And, according to The Pensions Regulator, seven out of 10 will want your support.

Use our template letters, emails and tweets

To help you introduce auto-enrolment to your clients and explain how you can support them, we've put together a selection of letter/email templates and tweets for you to use.

One of the letter/email templates links to a new animation we've produced, which explains auto-enrolment in a simple and entertaining way. Another links to our interactive planning tool, which you can use to help clients prepare for the new workplace pension rules.

There's a third template in case you simply want to direct your clients to the support Aviva can offer. And a fourth is designed for use with prospective clients.

Edit as you see fit

While these letters, emails and tweets are designed to help you communicate with clients, we can make no claims about their effectiveness. Nobody knows your audience better than you, so please feel free to amend the wording as you see fit.

And, of course, please remember that it is your responsibility to make sure your communications are appropriate and meet regulatory requirements.

Helping your clients plan?

Our free Auto-enrolment Planner tool is ideal if you're helping several clients prepare for auto-enrolment. Plus, you can tailor the plans it produces to match the services you provide.

Find out more and register free at autoenrolmentplanner.co.uk



Letter/email templates for existing clients

Please feel free to edit the wording below as you see fit, ensuring it is relevant and accurate before you send. Sections in <angled brackets> will need amending.

Template letter/email 1: auto-enrolment explained

Ideal when you wish to explain auto-enrolment to a client before highlighting how you can help. This template links to an animation we've produced that explains auto-enrolment in just over a minute.

<Client's name> – auto-enrolment support for your business

Dear <client's name>,

According to my records, your auto-enrolment staging date is coming up <before long/on [date]>.

This means you'll soon need to be compliant with the new workplace pension regulations, or you could face penalties from The Pensions Regulator.

If you haven't started making preparations yet, now's the time to act. And as your <accountant/bookkeeper/payroll administrator/broker>, I can help.

Your new pension duties explained – quickly and simply

To help you understand exactly what auto-enrolment means for you, here's a link to a short video from Aviva that you might find useful.

<https://youtu.be/ESoce3xxC20>

It explains – in a refreshingly simple way – what auto-enrolment is, and what you need to do. <Other clients have found it helpful, and I thought you might, too.>

Get help dealing with this major business change

If, after watching the video, you'd like to know how I can support you, please get in touch. <I'm already helping other clients by: > **OR** <The ways I can help you include:>

- helping to prepare your business
- helping with pension scheme selection
- administering the scheme once it's up and running
- and more.

If you'd like to talk about your options, please email me at <your email address> or give me a call on <your telephone number> and we'll arrange a convenient time to meet.

Yours sincerely,

<Your name>

<Your job title>

P.S. If you've already started preparing for auto-enrolment, great. But I'd still like to speak with you to understand which pension scheme you've chosen and how compatible it is with your payroll system. So please call on <your telephone number> today.



Letter headline / email subject line.



Remember to edit this list of services to match those you provide.

Template letter/email 2: planning support

For clients with at least three months until their staging date (and ideally more). This template links to our interactive planning tool, which you can use to help your clients prepare for the new regulations.

<Client's name>, Are you ready for auto-enrolment? We can help



Letter headline /
email subject line.

Dear <client's name>,

By now I'm sure you've heard of 'auto-enrolment' – and know you'll need to do something about it before long.

But did you know that as your <accountant/bookkeeper/payroll administrator/broker>, I can help you deal with these complex new workplace pension regulations?

A planning tool to help you prepare

There can be a lot of work involved in preparing for and complying with auto-enrolment, and it can take several months.

So if you'd like a hand getting started, I thought you might find this free planning tool from Aviva useful – as it explains all the steps you'll need to go through to get your business sorted.

<http://www.autoenrolmentplanner.co.uk>

You can use it by yourself, or we could work through it together to help you get your business ready to comply with the new regulations.

Get help dealing with this major business change

<There are several other ways I can help you deal with auto-enrolment, too.> OR <There are other ways I can help you deal with auto-enrolment, too, and I'm already doing this with several other clients.>

So if you'd like to talk about your options, please get in touch. Simply give me a call on <your telephone number> and we'll arrange a convenient time to meet.

Alternatively, you can email me at <your email address>

Yours sincerely,

<Name>

<Your job title>

P.S. If you've already started preparing for auto-enrolment, great. But I'd still like to speak with you to understand which pension scheme you've chosen and how compatible it is with your payroll system. So please call on <your telephone number> today.

Template letter/email 3: referral to Aviva

Use this template if you aren't providing auto-enrolment services – but still want to help your existing clients by directing them to a reputable pension provider.

<Client's name> – auto-enrolment support for your business



Letter headline /
email subject line.

Dear <client's name>,

We know many of our clients are now starting to think about auto-enrolment... and that preparing for it can be easier said than done.

So I thought you might be interested to know that Aviva are offering a range of support designed to make dealing with the new workplace pension regulations a lot easier:

- **Learn what your duties are**

If you're just getting your head around the regulations, Aviva's short introductory video is a good starting point. It explains – without a load of jargon – what auto-enrolment is, and what it means for you: <https://youtu.be/ESoce3xxC20>

- **Get help preparing your business**

Secondly, if you'd like a hand preparing your business to comply with the regulations, Aviva have created an interactive planning tool to help you do it. Sign up for free at autoenrolmentplanner.co.uk and you'll get a tailored plan just for your business.

- **Get a pension scheme quote**

If you're happy to set up your own scheme, Aviva offers a workplace pension for businesses of any size. It is simple to run, well-governed and 5-Star rated by Defaqto. You can get a quote online at aviva.co.uk/business/pensions/company-pension

Some important things to note

While we've directed you to Aviva's website above, please note that a number of other pension schemes are also available for auto-enrolment use that could be more appropriate for you. For more information about these, please visit thepensionsregulator.gov.uk

Please also note that the information in this email is not financial advice or guidance. If you'd like some workplace pensions advice, <you can find a financial adviser near you at unbiased.co.uk/please get in touch using the number below.>

We're here to help

If you have any questions, large or small, please don't hesitate to call me on <your telephone number>. Or you can email me at <your email address> at any time.

Yours sincerely,

<Name>

<Your job title>

Letter/email template for prospects

Please feel free to edit the wording below as you see fit, ensuring it is relevant and accurate before you send. Sections in <angled brackets> will need amending.

Auto-enrolment made easy – with professional support

Dear <prospect's name>,

Did you know that if your business isn't ready for the 'auto-enrolment' workplace pension rules yet, you'll need to act soon?

As <an accountant/a bookkeeper/a payroll administrator/a broker>, I can help you deal with these complex new regulations. And that's why I'm writing today.

A short video to explain your new duties

To help you understand exactly what auto-enrolment means for your business, here's a short video from Aviva that you may find useful.

<https://youtu.be/ESoce3xxC20>

It explains – in just a few seconds – what auto-enrolment is, and what your obligations are as an employer. <My current clients have found it helpful, and I thought you might, too.>

How I can help you with this major business change

If, after watching the video, you'd like to know how I can support you, please get in touch. <I'm already helping other clients by:/The ways I can help you include:>

- helping to prepare your business
- helping with pension scheme selection
- administering the scheme once it's up and running
- and more.

If you'd like to talk about your options, please give me a call on <your telephone number> and we'll arrange a convenient time for a discussion.

Alternatively, you can email me at <your email address>.

Yours sincerely,

<Name>

<Your job title>

P.S. Whether you'd like my support or not, please act soon. While most businesses have acted to comply with the regulations, The Pensions Regulator has already fined some of those who haven't.



Letter headline / email subject line.



Remember to edit this list of services to match those you provide.

Tweet ideas

Twitter can be a great way of connecting with both existing and potential clients. If you don't already have an account, sign up for free at twitter.com

Tweets to explain auto-enrolment



Your Name @your_twitter_name

1hr

Are you prepared for the new [#auto-enrolment](#) workplace pension rules? This short video from Aviva explains what's involved: [ADDLINK](#)



Your Name @your_twitter_name

1hr

Don't leave it too late to get ready for [#auto-enrolment](#). Watch this video from Aviva to find out what's involved: [ADDLINK](#)



Your Name @your_twitter_name

1hr

Learn what [#Auto-Enrolment](#) means for your business in a jiffy by watching this video from Aviva: [ADDLINK](#)



Your Name @your_twitter_name

1hr

How will [#Auto-Enrolment](#) affect your business? Find out by watching this 70-second animation from Aviva: [ADDLINK](#)

Tweet tip

Monitor how many people click on your links by turning them into a Bitly link first.

Sign up for a free account at bitly.com

Tweets for clients who may want help preparing



Your Name @your_twitter_name

1hr

Is your business ready for [#auto-enrolment](#)? Use Aviva's planning tool to find out what you need to do (and when): www.autoenrolmentplanner.co.uk



Your Name @your_twitter_name

1hr

Need help preparing your business for [#auto-enrolment](#)? Use this handy planning tool from Aviva www.autoenrolmentplanner.co.uk (or speak to us!).

Find out more

If you'd like to know more about how we can help you support your clients through auto-enrolment, please contact our national business development team:

Duncan Singer

 07800 690 452

 duncan.singer@aviva.com

Will Wood

 07800 692 413

 william.wood@aviva.com

Aviva Life Services UK Limited. Registered in England No. 2403746. 2 Rougier Street, York, YO90 1UU.
Authorised and regulated by the Financial Conduct Authority. Firm Reference Number 145452.

aviva.co.uk

BS01047 10/2015 © Aviva plc

