



# **The Aviva Pension Trust for Independent Schools (APTIS)**

Are you ready?

May 2020

## Are you ready?

Employers and Advisers can use this checklist to ensure you are ready and prepared once a decision is made to move to APTIS.

### Your checklist

- ☐ **Complete your Notice of Intent – At least 8 weeks before your intended start date**  
Visit our dedicated implementation site [APTIS](#) and access Ready to Join tab to complete your Notice of Intent. Once received, Aviva will then complete our 'Know your Customer' checks. We will then provide you with the relevant application forms to be completed.
- ☐ **Prepare your IT infrastructure and Whitelist Aviva email domains**  
Aviva have included details of our email domains from where policy documentation and other communication is sent to members via email. Whitelisting process will ensure communication from Aviva is not treated as SPAM. Details can be found under Member Collateral within our dedicated [APTIS](#) site.
- ☐ **Complete and return your [Employer Application Form](#) – At least 4 weeks before your intended start date**  
This form will confirm to Aviva the details regarding your school including details of Authorised representatives who will be responsible for administering the pension.
- ☐ **Complete and return your [Deed of Participation](#) – At least 4 weeks before your intended start date**  
This form enables your school as a participating employer to join APTIS as part of the Aviva Master Trust. Form will need to be signed by either two Directors or a Director and Secretary of your school.
- ☐ **Communicate with your staff**  
Aviva have prepared collateral available to you to keep staff informed of the upcoming changes to their Pension. This can be accessed via our dedicated site for your staff <https://workplace.aviva.co.uk/aptis/>
- ☐ **Ensure your payroll is ready with our Data Requirements and set up for Training - At least 4 weeks before your intended start date**  
Visit our dedicated implementation site [APTIS](#) and access these requirements under the Pension tab, then Employer Collateral. Our dedicated Implementation team will provide you with full support for preparation of your data and will schedule training once your scheme is live. This training will show your authorised representatives how to upload New Joiners and submit contributions and will be conducted after your intended start date.

Our dedicated [APTIS](#) implementation site also hosts other useful information for your use, such as;

- Salary Sacrifice collateral
- Frequently Asked Questions
- Platform Demonstrations
- Links to Scheme Literature include a Member Guide and Investment Guide
- Information on our Group Life and Group Income Protection offering

Our team will be happy to support with any queries and can be contacted at [aptis@aviva.com](mailto:aptis@aviva.com)



# Thank you

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