



The Tradition Partnership

Bespoke Pension and Investment Solutions

Bringing traditional pension values to life

ASSISTING CORPORATE ADVISERS

The Tradition Partnership assists Corporate Advisers by providing quality bespoke workplace pensions for your clients.

We provide the consultation, bespoke structure and investment options that enhance your value as a corporate adviser. We firmly believe that in partnership with you, your standing with your corporate clients will be reinforced and valuable income streams can be protected, empowering you to concentrate on relationship management not the complexity of the arrangements

Solicitors, Accountants and Financial Advisers all have corporate clients that need advice on the structure and implementation of workplace pensions including the need for employers to receive and act on advice in relation to the proposed implementation of Personal Accounts and their requirement to auto enrol members. The issues around workplace pensions are further complicated by the Retail Distribution Review which has an impact on how arrangements are structured, costed and remunerated.

All employers that have either implemented or considered group schemes through Life companies and Banks will require assistance and The Tradition Partnership are ideally placed to support you in this.

Historically the Employee Benefits market, particularly workplace pensions, regularly change provider to assist in covering the cost of servicing arrangements. This creates uncertainty for members, additional administrative issues for payroll departments and very little overall benefit.

Our approach to workplace pensions is one which both employers and employees find refreshing. Clear and regular communication ensures all parties have a full understanding of the broad range of benefits that arise from being a member of their employers pension arrangement.

Here at Tradition we bring traditional pension values to life, we do this by:

Implementing a Pensions Board within every company pension scheme

Creating a Statement of Investment Principles for each and every company pension scheme

Holding regular pension Board meetings

Communicating to all staff are about the company pension scheme to ensure they understand the benefits

Ensuring all stakeholders are working to the same clearly defined goals and objectives





HOW THE TRADITION PARTNERSHIP CAN HELP CORPORATE ADVISERS

Our core foundations are built on traditional values which we believe enhance any type of workplace pension.

We help employers promote retirement benefits for all their employees for:

Occupational schemes

Group personal pension schemes

Stakeholder schemes

We can also:

Assist with structuring and implementing plans for defined benefit schemes in deficit

Educate and communicate effectively with both Employer and Employees when changes are necessary

Provide investment recommendations and justification that match the needs of the employer, employees and trustees

Project manage agreed changes using our experience to avoid any potential problems or conflicts

THE WORLD OF WORK PLACE PENSIONS MADE SIMPLE

Call us **FREE** to discuss your specific needs **0800 612 51 41**

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