

Succeeding with automatic enrolment: expert insights for advisers

useful links

Key to icons



Detailed
guidance



Guidance



Download



Link

Common errors



View the guide for business advisers on our website:
[Automatic enrolment guide for business advisers](#)



The guide includes a range of resources for advisers to help you support your clients with their automatic enrolment duties:
[Supporting resources](#)

What to do when the wrong tax relief method is used



For information about tax relief methods, view the guidance for business advisers on our website:
[What to consider when choosing a pension scheme](#)



The employer must notify TPR of the error, visit our website:
[How to notify us](#)

Statutory leave and employer contributions



Visit the MoneyHelper website for more information:
[Maternity and paternity leave and your pension](#)

Postponement



View the guidance about postponement on our website:
[Guidance for business advisers: Postponement](#)



View the guidance for employers on our website:
[Postponement – automatic enrolment guidance for employers](#)

Directors



View the guidance for advisers on who is and isn't included:
[Check who to automatically enrol in a workplace pension](#)



View the detailed guidance about assessing staff eligibility on our website:
[Employer duties and defining the workforce - automatic enrolment detailed guidance for employers](#)



View the guidance for business advisers about directors on our website:
[Director exemptions from automatic enrolment](#)

Changing pension schemes



Downloadable summary of what to consider when choosing a pension scheme:
[How to help your client choose a pension scheme](#)



For information about what to consider when choosing a pension scheme, view the guidance for business advisers on our website:
[What to consider when choosing a pension scheme](#)

Future changes

Expansion of automatic enrolment



To view the current version of the Bill, visit the UK Parliament website:
[Pensions \(Extension of AE\) Act 2023](#)



For information about The Private Members' Bill and its Royal Assent, view the gov.uk website:
[Pension saving boost for millions receives Royal Assent](#)

continued over...

Pensions Dashboards



For information about the Pensions Dashboard Programme (PDP) visit their website:

[Pensions dashboard programme](#)



To view the Pensions Policy Institute (PPI) lost pensions survey 2018-2022 visit the PPI website:

[Pensions Policy Institute](#)



To find out how you can help prepare your clients data for connection visit our website:

[Preparing your data for pensions dashboards](#)



For information about pensions dashboards visit our website:

[When your scheme needs to connect with dashboards](#)

Avoiding scams



To make the pledge to combat pension scams visit our website:

[Pledge to combat pension scams](#)



For information about reporting pension scams visit our website:

[Avoid and report pension scams](#)