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**Change**

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From the main page in Workday, click on the “Benefits” icon, and then click on the “Benefits” link under the Change section.

**Please note:** You can save your enrolment elections and complete at a later time. To pick up where you left off, just go into your Workday inbox.

## PLEASE NOTE

- In this step you will **only** select:
  - 1) A reason for the benefits change.
  - 2) The effective date of that reason.
- Benefits selections are completed by clicking **OPEN** in the *Next Steps* section on the following page.
- The attachment section **is not** necessary.
- Please email ~HR Benefits or call x 5886 if you have questions about life events and the benefits change process.

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Benefit Event Type \* Pension Plan Enrolment ▼

Benefit Event Date \* MM / DD / YYYY 

Submit Elections By (empty)

Enrollment Offering Types (empty)

## Attachments

1. Select Pension Plan Enrolment as the “Benefit Event Type”.
2. Put today’s date as the “Event Date”. This will enrol you into the pension effective the following month.
3. Click on the orange “Submit” button.
4. On the next page, click the “Open” button below your photo.

As an employee you're eligible for membership in the Fisher Investments Europe Limited (the Company) pension scheme. You will be auto-enrolled into the plan upon completion of your third month of employment (assuming you earn more than £10,000 per annum, are aged 22 or over, and are under the State Pension age). If you choose to opt-in earlier, you may do so.

The Company will contribute 9% of your monthly base salary, as earned, even if you choose not to make your own contributions. You may also personally contribute. We will match your contributions up to an additional 5%, making the total Company contribution up to a maximum of 14% of your monthly base salary.

You have two options to save towards your retirement pension savings: 1) Salary Sacrifice or 2) Non-Salary Sacrifice. To determine which option is right for you we recommend you talk to a tax advisor.

**Salary Sacrifice:** This option allows you to lower your tax liability by way of sacrificing (or exchanging) a percentage of your base salary pay. The Company will then make the full contribution (i.e. your sacrificed portion plus the Company match) on your behalf.

**Non-Salary Sacrifice:** This is your default contribution method. This is what the HMRC refers to as "relief at source" meaning both you and the Company make contributions which are made after tax and national insurance contributions (NICs) have been deducted from your base salary pay and the tax relief is made at the pension provider.

*Of note, if you have opted into the pension prior to your three month postponement period and after Payroll has been processed for that month, your contribution percentage change will go into effect the following pay period.*

*Questions? Call FIE HR, Nichola Peen (x6716), Eleanor Berks (x6190), or email [Payroll International](#) if you have questions.*

Retirement Savings Elections 2 items

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
Pension - L & G Non-Salary Sacrifice	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Maximum 100
Pension - L & G Salary Sacrifice	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 15 <input type="text"/>	Percentage Maximum 100

Continue

Save for Later

Cancel

4. Choose your contribution method, Non-Salary Sacrifice **OR** Salary Sacrifice by clicking "Elect" next to the plan.

Note: If you do not make changes during your first 90 days of employment or during Open Enrolment period (April and October), you will remain in your current method. The default method is Non-Salary Sacrifice.

5. Under the "Employee Contribution" section, select the percentage that you would personally like to contribute.

Note: Fisher will automatically contribute 9% of your basic salary into the pension. Your contributions will receive a match of up to an additional 5%. This means you could get pension contributions from Fisher up to 14% with a 5% contribution coming from yourself!

6. Click "Continue".

Elected Coverages 1 item



Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Beneficiaries
Pension - L & G Salary Sacrifice	10/01/2017	10/01/2017	15%	

## Attachments

Drop files here

or

Select files

## Electronic Signature

### Declaration

I provide my confirmation of enrolment in the pension and agree to allow Fisher Investments Europe Limited (the Company) to act on my behalf by taking all the necessary steps to ensure my membership in the pension including the appropriate deductions based on my selected method of contribution. If I have opted into the Salary Sacrifice pension arrangement, in making this decision I acknowledge that:

- I understand that by joining the Salary Sacrifice pension arrangement I will no longer make personal contributions to my pension scheme; instead, the Company will make contributions to the pension on my behalf through Salary Sacrifice.
- By participating in the Salary Sacrifice pension arrangement, I agree to give up part of my gross basic salary that I would otherwise contribute to the pension scheme in exchange for the Company making the same level of pension contributions on my behalf.
- I understand that my gross salary will be reduced accordingly. I further understand that this change will represent a change to clause 7.1 (Salary) of my contract of employment with the Company. All other terms and conditions of my contract of employment remain in effect unamended.
- I understand and agree that during any period where I received the statutory pay, I will be taken out of the Salary Sacrifice pension arrangement. This will enable me to preserve my earnings during this period. If I wish to continue pension contributions during this period, I will need to inform the Human Resources Manager in writing before the Payroll processing deadline. I further understand that should I wish to continue to make pension contributions during this period, they will be paid in the conventional, non-Salary Sacrifice (PAYE) way.
- I am aware that by opting into the Salary Sacrifice pension arrangement, I will not be able to opt out except during the Company's pension open enrolment periods (during the April and October pay periods). The exception to this would be if I experience life event as defined by the Company.
- I acknowledge that I have read and agree to the Terms and Conditions set out in the Guide to Salary Sacrifice Pension.

If I have opted into the Non-Salary Sacrifice pension arrangement, I understand that the points above related specifically to Salary Sacrifice will not apply to me.

I agree to allow the Company to disclose my name, address, date of birth, national insurance number, and any other information necessary to ensure the supply and administration of the pension plan to the Company selected pension provider and plan administrator of the plan as well as Fisher Investments in the United States.

I Agree

Submit Save for Later Go Back Cancel

7. Review your entry, review the declaration, and click on the "I Agree" box.

8. Click "Submit" once you are done.

9. Click "Done" on the final page and your enrolment will be sent over to HR for approval. You will be notified if there are any questions regarding your enrolment.