



The National Employment Savings Trust (NEST) Infographic

Is a NEST Pension for me?

The National Employment Savings Trust (NEST) was set up in 2008 to facilitate auto-enrolment in the UK. Find out if a NEST pension is for you in this infographic.

I AM SELF EMPLOYED

I AM EMPLOYED

I HAVE A PENSION

I NEED A PENSION

I DON'T YET HAVE A WORKPLACE PENSION

I'VE ALREADY BEEN AUTO-ENROLLED

I HAVE MORE THAN ONE PENSION

I WANT TO OPT OUT

I'M CONSIDERING A NEST PENSION

CONSIDER COMBINING PENSIONS INTO SINGLE POT

YOU CAN OPT OUT WITHIN 30 DAYS

I MAY ALSO EMPLOY OTHERS

IF SELF-EMPLOYED YOU MUST SETUP YOUR OWN NEST PENSION

ASK YOUR EMPLOYER TO SET UP YOUR PENSION

I WANT TO MANAGE MY PENSION EFFECTIVELY

I WANT TO SET UP AUTO-ENROLMENT

FIND OUT WHO IS ELIGIBLE AND ENROL WORKERS

WHAT I COULD GET UPON RETIRING?

MY EMPLOYEES MAY NOT BE ELIGIBLE

I WANT TO DELEGATE SOMEONE ELSE / GET HELP

I WANT TO MANAGE MY PENSION/S ONLINE MYSELF

USE A NEST PENSION CALCULATOR

EMPLOYEES MAY QUALIFY FOR OTHER PENSIONS (e.g. STATE P.)

NEST CONNECT IS AN ONLINE HUB FOR MANAGING NEST

ONGOING SCHEME MANAGEMENT: INFORM THE PENSIONS REGULATOR ONCE SET-UP KEEP ACCOUNT INFO UP TO DATE

HELP CHOOSING THE BEST SCHEME FOR YOUR CLIENTS

PENSIONS ADVISERS

JOINING NEST

MOST MEMBERS JOIN VIA THEIR EMPLOYER

INTEGRATE WITH SAGE, IRIS, MONEYSOFT etc

ACCOUNTANTS

CONTRIBUTIONS & FEES

MINIMUM 5% OF SALARY NO MAX AMOUNT

1 IN 3 WORKPLACE PENSIONS SET-UP WITH NEST

PAYROLL PROVIDERS

HOW DOES NEST MANAGE MY MONEY?

**1. CASH
2.. SHARES
3. LOANS**

IFAs CAN RELY ON NEST TO PROVIDE BEST VALUE SCHEMES TO A BROAD RANGE OF CLIENTS

INDEPENDENT FINANCIAL ADVISERS

TRANSFERRING MY PENSION POTS

NO CHARGE TO TRANSFER INTO NEST

NEST INTEGRATES SEAMLESSLY WITH PAY-ROLL SOFTWARE

PAYROLL INTEGRATION

BENEFICIARIES

INDIVIDUAL OR SEVERAL PEOPLE

BROUGHT TO YOU BY

STEEDMAN

ACCOUNTANTS • TAX CONSULTANTS

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