



Workplace
Pension
Solution for
Barristers


WREN
STERLING

Supporting your Barristers

Wren Sterling has an exclusive partnership with Aviva, which offers Barristers the opportunity to pay into a workplace pension scheme via their Chambers' payroll facilities.

Wren Sterling's Barrister Workplace Pension Solution is headed by Sarah Herd, Wren Sterling's Director of Employee Benefits and Engagement. Sarah has over 20 years of experience in corporate financial planning, supporting businesses large and small with their workplace benefit selection and implementation strategies with particular expertise in the legal sector.

✉ sarah.herd@wrensterling.com

☎ 07720 304356

“

I have worked with Sarah since 2015, when our Chambers first looked at pension auto enrolment. She brings an often boring subject to life and has the ability to explain complicated ideas in a way that a layperson can easily understand.

She clearly has an intimate knowledge of Pensions and Investment Management and combines excellent organisational skills, meticulous and thorough preparation and a customer-friendly style. Working with her is a pleasure and she is the sole reason why we instructed Wren Sterling after she left Barclays.”

Andrew Ross - Chambers Business Manager,
5 Paper Buildings



Make retirement saving easier for Barristers

Historically, barristers have been unable to pay into workplace pension schemes as they are classed as self-employed. However, Wren Sterling and Aviva have agreed a scheme that allows this, enabling barristers to easily build their workplace pension funds and effectively plan for retirement.

Wren Sterling's Barrister's scheme is new to the market and offers several benefits:

- Suitable for any barristers' chambers
- Maximum annual management charge (AMC) of 0.39%
- Guaranteed acceptance**
- Support your barristers with simple retirement planning as payments can be made to Aviva via payroll



Competitive pricing



Barristers can now enjoy the charges typically offered for group schemes versus higher charges usually offered to individuals. There's a choice of funds from across the market designed for many different risk appetites.



** Subject to passing Aviva and Wren Sterling's anti-money laundering checks

Our workplace pension process

Discovery phase

This is our chance to understand exactly what your workplace pension requirements are. It's also when we will agree a way of working, including contact points and set expectations on service levels.

Agreement to proceed

Following the discovery session, we will discuss your requirements with our provider and present our optimal solution, including pricing.



Present solution

Hopefully our solution will be the perfect fit for your requirements and we can move forward. If not though, this is your chance to ask any further questions before we proceed.

Ongoing Financial Education and Communications Support

Wren Sterling specialises in maintaining engagement with employees and their employee benefit packages. Our suite of complementary services (detailed overleaf) mean you're in safe hands and a bespoke programme can be devised to run over the course of a year.



Aviva Pension Process

After the successful implementation of your workplace pension, members have the option of transferring their other workplace pensions into their new one with Aviva. Our account manager will ensure a swift process that keeps your members informed every step of the way.

How we support you

Wren Sterling's services don't end at the implementation of your workplace pension scheme. Circumstances change and it is best practice to maintain an ongoing relationship with your consultant.

Governance is becoming increasingly important for employers and trustees and this is a service we provide to the majority of our pension scheme clients. Our commitment is to:

- Ensure a robust process is in place to monitor your workplace pension
- Establish a governance committee and meet at least annually
- Produce a governance report for your records
- Enable you to demonstrate good practice to The Pensions Regulator (TPR) by providing contingency and continuity planning
- Ensure your compliance obligations are met
- Keep you up to date with legislative changes
- Make sure you adhere to good member outcomes, which are the pillars of auto enrolment legislation. For example, monitoring the performance of the default fund

Most importantly, employees generally have no input into the workplace pension, so it is essential that as an employer you make decisions in their best interest. This is where we can steer you in the right direction and help you achieve the best outcome possible.

NB this service incurs an annual cost.

Why Wren Sterling?

Wren Sterling advises thousands of individuals, SMEs, large private firms and multinationals on every aspect of private client and corporate financial planning.

We work with the UK's best-known insurance providers, we have consultants based across the UK who are supported by a highly capable support team and we're committed to very high standards of customer service.

Our blend of corporate and private client consultants ensures that our corporate clients can access independent financial advice for their directors and employees, wherever they are in the UK.

You may have heard of some of our other clients; Kier, AstraZeneca, Aliaxis, BP, Doyle Clayton, Cadbury, Northumbrian Water... and many more.

Get in touch:

✉ sarah.herd@wrensterling.com

☎ 07720 304356

Over **13,000** clients nationwide

£3.4 billion in assets
under advice

4.4 out of 5 on
★★★★☆

 **REVIEWS**
WWW.REVIEWS.CO.UK

Close relationships with the UK's
leading investment managers and
insurance providers

Get in touch

Sarah Herd has been advising Barristers' Chambers on their workplace financial planning for many years. She has a deep understanding of the unique requirements and tax positions of Barristers' Chambers.

✉ sarah.herd@wrensterling.com

☎ 07720 304356

The value of an investment can go down as well as up. Investors may get back less than their original investment.

Wren Sterling is a trading name of Wren Sterling Financial Planning Limited, which is authorised and regulated by the Financial Conduct Authority. Registered No. 665653.

Registered office: 13-19 Derby Road, Nottingham NG1 5AA. Registered in England No. 09157918.