

My Workplace Pension Who We Are



MY WORKPLACE
PENSION

My Workplace Pension has been designed to meet the needs of the small business community to deliver their legal requirements for a compliant auto-enrolment scheme for their employees.

The Scheme is governed by a Trustee Board:

Workplace Pension Trustees Limited. The board of trustees consists of three directors whom have extensive experience in pension and trustee matters. Workplace Pension Trustees Limited is a member of the Association of Member-Directed Pension Schemes and a member of the Lifetime Pensions and Savings Association, which is the Industry Body representing pensions and savings for individuals and employers.

The Trustee Board holds scheme professional indemnity insurance with Axis Crusade to the value of £2,000,000 in respect of any one claim.

The Scheme is administered and technology software partner with:

AE Scheme Solutions Limited and **L&P Systems Limited.** The scheme administrator and software partner work under a contracted agreement with the Trustees.

L&P Systems provide administration, pension payroll and online member access solutions which are both compliant and proven. L&P as a specialist in this field have extensive experience with occupational scheme requirements.

AE Scheme Solutions delivers scheme reporting and administration compliance under a comprehensive administration services agreement with the Trustee Board. AE Scheme Solutions holds in respect of these

functions separate professional indemnity insurance of £2,000,000 for any one claim with the insurer, Beazley Solutions Ltd.

Bankers

The appointed Bankers to the Scheme is **Barclays Bank plc**, which provides all scheme banking services, including payment services.

Auditors

The Auditor for the Scheme is **Gleeson Bessent**, the founding partner is Roger Bessent who is a Fellow of the Association of Chartered Accountants, a member of the Academy of Experts and the Society of Expert Witnesses.

Fund Managers:

1. **Westbury Private Clients LLP** which is authorised and regulated by the Financial Conduct Authority (FCA). FCA Firm Reference No 595603.

James Goodchild who is the Principal of Westbury Private Clients LLP. James has managed both private and institutional money exceeding £1 billion in fund. James hold a masters with distinction in Finance and a degree with honours in Law. He holds chartered status at the Chartered Institute for Securities and Investment. He is winner of the Top 40 Under PAM award for the years 2011 and 2012.

2. **Vanguard Asset Management**, are part of Vanguard Group which has \$3.4 trillion assets under management. Vanguard Asset Management Limited which is authorised and regulated in the UK by the Financial Conduct Authority under reference number 527839.

Vanguard Asset Management which as part of Vanguard Group is one of the world's largest passive asset managers with an exemplary track record in passive asset management.

3. **Strand Capital Limited** is authorised and regulated in the UK by the Financial Conduct Authority under reference number 494001. Strand Capital is part of Optima Worldwide Group which is has interests in asset management, merchant banking, security, natural resources and agricultural sectors as well as providing professional services and advice, to Governments, Companies and select individuals in the UK, Middle East, South Asia and Africa.

The lead managers for Strand are Hamilton Keats, a physicist and statistician from Imperial College London and Steffen Hoyemsvoll a physicist from University of Oxford.

Indemnity and Scheme Insurance Underwriters

Axis Speciality London, is a branch of AXIS Specialty Europe Limited which is a global insurance underwriter. Axis help provide financial protection against claims alleging negligence, errors and omissions and other wrongdoing in the performance of professional services. Axis has a dedicated team of specialists with over 20 years experience to deliver risk management, customised scheme coverage and excellent claims service.

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