



# Elevate Pension Investment Account - Employer's record of payments due

## About this form

As the employer, you should fill in and sign this form if you are contributing to this employee's pension plan.

As an employer, it is your legal responsibility to provide Elevate with a record of payments due before you pay a contribution. This record should list the contributions you expect to pay to the Elevate Pension Scheme (No 1) until the employee's expected pension age, or earlier date where notified. We will use this to check the contributions we receive from you against the amounts shown on the record.

Contributions must be paid to us by the due date, which is the day you are due to make employer contributions.

Please complete this form using **black ink** in **CAPITAL LETTERS**. Section A should be completed by the adviser; Sections B, either C and/or D and E should be completed by the employer.

### Section A

#### Employee details

To be completed by the adviser

Employee name

Elevate account number

### Section B

#### Employer's details

To be completed by the employer

Employer name

Employer address (inc postcode)

Employer contact name

Employer contact number

#### Type of organisation

Public Limited Company

Sole trader

Private Limited Company

Trust

Partnership

Registered charity

If a regular payment is being made please fill in Section C.





## Section E

### Employer's declaration

To be completed by the employer

Please read the declaration and fill in the details below.

I confirm that:

- I have checked that the information detailed in Sections A-D is correct.
- This form is my record of payments due for the above named employee and takes effect from the date of the first payment due from me or the date of the revised payment to the Elevate PIA.
- I will tell Elevate of any future changes to the payments I am making to this Elevate PIA before the date of the next revised payment and provide a new record of payments due.
- I will pay the employer's contributions stated on this form and I understand that these contributions will be invested into the Elevate PIA to provide retirement benefits for my employee and I have absolutely no rights in respect of this plan.

Full name

Position in company

Contact telephone number

Signed by or on behalf of the employer

Date  
(DD/MM/YYYY)

Please return the whole of this form to the address below.

Elevate  
PO Box 6877  
Basingstoke  
RG24 4RT  
United Kingdom

If you have any further queries please contact Elevate on 0345 600 2399, quoting the Elevate account number on the previous page.

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