



SCHEME INFOSITE

These slides are authorised for use by accredited
Scottish Widows Consultants when making workplace pensions
presentations to employees.

For Employer use only.

SCOTTISH WIDOWS

INFOSITE LOG IN LINK

<https://www.scottishwidows.co.uk/save/ajd/>

- The Infosite is your go to place for information on your Scottish Widows policy.
- Here you can access Key Features Documents, Investment Information/Guides and more.

INFORMATION WEBSITE

The screenshot displays the Scottish Widows website interface. At the top left is the **SCOTTISH WIDOWS** logo. In the top right, there are links for **Contact us** and **Log in**. A dropdown menu is open under **Log in**, containing the text **LOG IN TO:**, **Money4Life >**, and **Need help to log in? >**. Below the navigation is a hero section with the text **YOUR WORKPLACE SAVINGS** and a **PLAN NAME** input field. A **QUICK LINKS** section contains three items: **Tools to help plan your future**, **Your investment charges and choices**, and **Your key documents library**. At the bottom, a red banner features a **COVID-19 UPDATE** with an exclamation mark icon and a **Find out more** button.


scottishwidows.co.uk/save/schemename



PLAN LIBRARY – GUIDES TO HELP YOU FIND THE INFORMATION YOU NEED

YOUR KEY DOCUMENTS LIBRARY

INFORMATION ABOUT YOUR PLAN ✓ INVESTMENT CHOICES TAKING YOUR BENEFITS **OTHER INFORMATION**




INFORMATION ABOUT YOUR PLAN

- Plan Guide** This guide should answer most of the questions you might have about your plan.
- Key Features Illustration** This illustration shows our standard charges and how they could affect what you might get back. Your actual charges may be different from those shown, please see your personalised illustration for details of these.
- Key Features of your plan** This contains important information about your plan which you need to read.
- Terms and Conditions** This contains details of the terms and conditions of the plan.
- Pension Tax** This guide gives information on how your plan is affected by current tax legislation.

We may have provided links to documents and other information supplied by third parties (including your employer or scheme trustees, and their advisers), who are solely responsible for their content and accuracy. All statements, views and opinions contained in these documents and other information are those of the third parties, not Scottish Widows.

YOUR KEY DOCUMENTS LIBRARY


INFORMATION ABOUT YOUR PLAN INVESTMENT CHOICES TAKING YOUR BENEFITS OTHER INFORMATION ✓



OTHER INFORMATION

- Pension Transfer Guide** This guide describes the potential benefits of transferring existing benefits to your Retirement Saver and highlights some of the things to consider.
- Transfer In Form** If you decide to transfer please complete this application.
- MIFID T&Cs** Important information on the Markets in Financial Instruments Directive.
- MIFID T&Cs** Order Execution Policy for the Markets in Financial Instruments Directive.

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TRANSFER GUIDE

COMBINING YOUR PENSIONS WITH SCOTTISH WIDOWS

This guide describes the potential benefits of you transferring the value of a pension plan to your current Retirement Saver with Scottish Widows and the things you should think about before deciding to transfer.

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TRANSFER IN FORM

Please complete this transfer form if you want to transfer the value of an existing pension plan to your Scottish Widows Retirement Saver or your Group Stakeholder Pension Plan (StP plan).

Where you select this form we will arrange the transfer with your previous pension provider. It is your responsibility to check whether a transfer is right for you. We recommend you seek independent financial advice. This transfer will be subject to the usual pension rules. With appropriate consent such as defined benefits, we may ask you to provide us with evidence or supporting financial advice before arranging the transfer.

By using this form, we strongly recommend you read the pension transfer guide and other information about your plan available on your website. We will contact you with the details of the transfer. You will be asked to provide your details and to agree to the transfer. We will contact you with the details of the transfer. You will be asked to provide your details and to agree to the transfer. We will contact you with the details of the transfer. You will be asked to provide your details and to agree to the transfer.

We are committed to ensuring the highest quality, best use and share information about you complete only with data that is relevant, accurate, complete and up to date. We will use your information to provide you with the best service possible. We will use your information to provide you with the best service possible. We will use your information to provide you with the best service possible.

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