

Suggested wording for Letter of Engagement for duties of Auto-enrolment

Auto-enrolment brings a new range of duties to the employer.

As your bookkeeper, we are able to fulfil any or all of these duties; however, you can choose to perform some of these duties yourself. This addendum will clarify which elements of the Auto-enrolment process will be performed by the respective parties.

Please be aware that the responsibility for compliance with the legislation resides with the employer.

Auto-enrolment duty	Who to fulfil?
Checking your client's start (staging) date	Bookkeeper/client*
Being a point of contact	Bookkeeper/client*
Checking who to enrol	Bookkeeper/client*
Creating your client's action plan	Bookkeeper/client*
Working out your clients costs	Bookkeeper/client*
Checking records and payroll processes	Bookkeeper/client*
Assessing and enrolling staff	Bookkeeper/client*
Writing to your client's staff	Bookkeeper/client*
Completing client's ongoing duties	Bookkeeper/client*
Completing the declaration of compliance	Bookkeeper/client*
Re-enrolment	Bookkeeper/client*

*Delete as appropriate

We confirm that we have discussed the responsibility for Auto-enrolment with CLIENT NAME and the above agreed actions are an accurate representation of which party will perform the required duties of auto-enrolment.

Signed _____ Date _____

NAME

BOOKKEEPER

Please note that this document is for reference only and does not constitute advice



I/We being the client/clients shown above, instruct **BOOKKEEPER** to commence work on our behalf in accordance with its normal Terms of Business and Data Protection Statement (a copy of which we have already received) and this Letter of Engagement.

NAME

on behalf of

Signed _____ Date _____