



# Benefit Options

## Connecting members with their pension

### What is Benefit Options?

Benefit Options is a secure online portal for members of Defined Benefit and Defined Contribution pension schemes. We are able to bespoke some functionality to reflect the specific needs of each client.

Benefit Options includes the following functionality and features:

- accessible on a wide range of devices including smartphones, tablets and PCs;
- ability to check and update personal details, target retirement, future contributions and Expression of Wish Forms;
- access all member accounts administered by Quantum Advisory via a single login;
- access to scheme documentation and member specific documentation e.g. benefit statements, payslips and scheme booklets;
- ability to request quotations e.g. formal transfer quote or retirement quote;
- view Annual and Lifetime Allowance;
- view account breakdown made up of employer contributions, employee contributions, investment return or transfers in;
- view contribution history;
- view investment performance;
- retirement modelling tools; and
- correspond with their administration team.

### Why use Benefit Options?

The use of Benefit Options has delivered tangible results for trustees and employers, primarily in terms of cost reduction, timely provision of scheme information and improved member engagement.



#### Cost reduction

Enabling members to gain access to information relating to their pension scheme membership and their scheme in general reduces the need for employers to provide the same information, either through their Human Resource function or the scheme administrators. This results in lower scheme administration costs and reduced calls upon employer resource to deal with member queries.



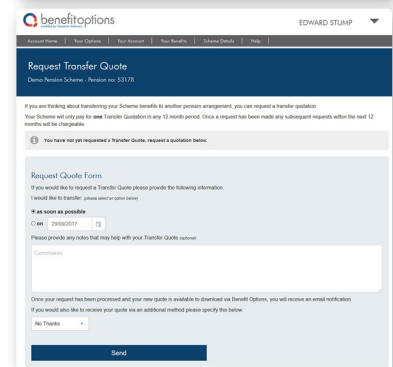
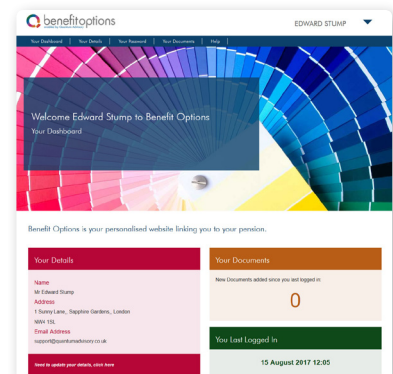
#### Timeliness

Members can instantly access details of their pension account online, ranging from a simple fund valuation or change of address to action alterations to their investment instructions and viewing real time investment performance. Benefit Options also allows members to access generic scheme information such as member booklets and member communications e.g. newsletters and announcements.



### Improved member engagement

As Benefit Options is available 24 hours a day 365 days of the year it gives members the freedom to review and make alterations in respect of their pension scheme membership when it is convenient for them. In addition, the ability to bespoke Benefit Options to reflect the characteristics of your scheme ensures that members always find the content relevant and engaging.



### Want to know more?

If you would like to know more about Benefit Options, please contact your usual Quantum contact or email [benefitoptions@quantumadvisory.co.uk](mailto:benefitoptions@quantumadvisory.co.uk)

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A list of all members is available for inspection at our registered office.