

Gateway Multi-Employer Pension Scheme (MPES) Employer Application

EMPLOYER DETAILS

Employer Name <input type="text"/>	Employer Address <input type="text"/>
Phone Number <input type="text"/>	
Email Address <input type="text"/>	
Financial Accounting Year End <input type="text"/>	Tax Reference Number <input type="text"/>

EMPLOYER BANK ACCOUNT DETAILS

Bank Name <input type="text"/>	Bank Address <input type="text"/>
Sort Code <input type="text"/>	
Account Name <input type="text"/>	Account Number <input type="text"/>

PLAN INFORMATION

Plan Name <input type="text"/>	
Plan Commencement Date <input type="text"/>	Normal Retirement Age <input type="text"/>
Regular Employer Contribution % <input type="text"/>	Regular Employee Contribution % <input type="text"/>

ALL CONTRIBUTIONS ARE TO BE MADE ELECTRONICALLY BY BACS OR FASTER PAYMENT TO THE ACCOUNT DESIGNATED BY BOAL & CO

FINANCIAL ADVISER DETAILS (IF APPLICABLE)

Company Name <input type="text"/>	Contact Name <input type="text"/>
Phone Number <input type="text"/>	
Email Address <input type="text"/>	

FINANCIAL ADVISER FEES (IF APPLICABLE)

Annual Fee (charged monthly in arrears)
 %

PLAN ADMINISTRATOR

We adhere to strict confidentiality procedures when we communicate with our clients. For security purposes, we will regard the details you provide as your authorised contact details; it is therefore important that they are accurate and that you let us know if any of these details change.

ID and proof of address are required for the plan administrator. This is the person through whom all communications and/or instructions should be forwarded. This can be your relevant financial professional or an individual employed by the company.

First Name <input type="text"/>	Surname <input type="text"/>
Address <input type="text"/>	
Telephone Number <input type="text"/>	Fax Number <input type="text"/>
Email Address <input type="text"/>	

PENSIONS ONLINE ADMINISTRATOR

Please set up the following people as plan administrators/authorisers. If you wish to set up more online administrators, please use an additional form.

Please tick here and continue to the next page if this is the same as the Plan Administrator

First Name <input type="text"/>	Surname <input type="text"/>
Date of Birth <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Occupation <input type="text"/>	
Country of Residence <input type="text"/>	
Email Address <input type="text"/>	

EMPLOYER AGREEMENT

Please read the following carefully before signing to confirm your Agreement on page 4.

Definitions	
Agreement	means the agreement between us and you which is contained in the Deed of Participation, Terms & Conditions, completed Application Form and the Fee Schedule.
Application Form	means this Application Form.
Boal & Co	means Boal & Co (Gibraltar) Limited (a company incorporated in Gibraltar with company number 109157) and registered office at Suite 1.2.08, Eurotowers, Europort Road, Gibraltar, GX11 1AA or where the context requires or permits, to any Group Company. Where the context so admits or requires, the term Boal & Co shall include any Group Company and each of the employees, directors, officers, servants, or agents of any such company and their respective successors, assigns, transferees and estates.
Employer	means the employer detailed on this application form.
Gateway	means the Gateway Multi-Employer Pension Scheme.
Group Company	means Boal & Co, its subsidiaries, its parent and any subsidiaries of its parent and its associated companies including but not limited to Boal & Co (Gibraltar) Limited (company number 109157).
Rules	means the rules of the Scheme as annexed to the Trust Deed, as amended from time to time.
Scheme	means the Gateway Multi-Employer Pension Scheme.
Scheme Administrator	means Boal & Co (Gibraltar) Limited.
Trust Deed	means the definitive Trust Deed constituting the Scheme dated 12th June 2023 and as amended from time to time.
Trustee	means Boal & Co (Gibraltar) Limited or otherwise the Trustee or Trustees of the Scheme from time to time.

AGREEMENT

We confirm that by signing this document we are representing the Employer, and are also authorised to act on behalf of the Employer with regards to this application.

We confirm that unless notified in writing to the Scheme Administrator, the Employer will make monthly payments to the Scheme on behalf of the member(s). The contributions and investment returns achieved will be used to provide such benefits payable in accordance with the Trust Deed and Rules. We understand that the Deed and Rules may be amended from time to time at the discretion of the Trustee.

We confirm that we have complied with the Gibraltar General Data Protection Regulation and Data Protection Act 2004, and that the Scheme Administrator can assume that all members of the Plan have consented to data being passed to the Scheme Administrator.

We confirm that we have received permission to deduct contributions from the member(s) salary.

We confirm that we will provide all necessary 'Know Your Customer' and 'Source of Wealth / Source of Funds' as requested by Boal & Co to support this application.

This agreement will terminate on cessation of the Employer participating in the Gateway Multi-Employer Pensions Scheme.

Full Employer Name

First Authorised Signatory

Name of Authorised Signatory

Position of Authorised Signatory

Signed by Authorised Signatory

Dated

Second Authorised Signatory

Name of Authorised Signatory

Position of Authorised Signatory

Signed by Authorised Signatory

Dated



Retirement
Benefit
Solutions

Pension Trustee Services
Pension Administration
Actuarial Services

General (+350) 200 68022

Email gateway@boalco.com

Post PO Box 1250, Gibraltar, GX11 1AA

Registered Office Suite 1.2.08, Eurotowers, Europort Road,
Gibraltar

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Our focus; your financial future.

boalco.com |   

For further information on the regulatory status of our businesses please visit boalco.com/regulatory