



This communication is for employers only.
Not to be distributed to, or relied on by members.

Engaging your employees with their retirement savings

Supporting you at the start of
life's evolving financial journey.



You've spent a lot of time, money and effort putting your workplace retirement savings scheme in place. We want to help you communicate the value of this great benefit to your employees, so we've created this toolkit with lots of support all in one place.

You will have a dedicated implementation manager to support you throughout the journey.





Timeline

It's easy to help your employees get the most out of their new Aegon retirement savings scheme by giving them a clear journey and making them feel supported.

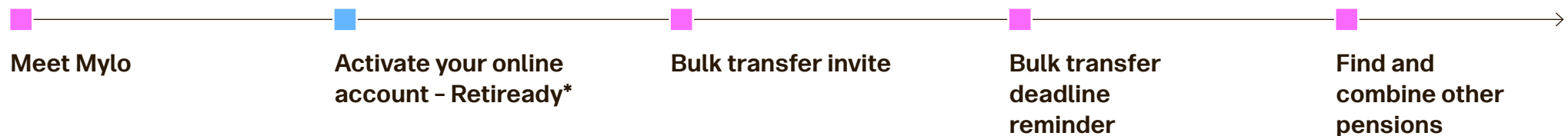
This is the approach your implementation manager will guide you through. We understand every business and workforce is different, and we'll work with you to tailor the journey to suit your specific needs.

**You'll find all of the communications in this toolkit
- with handy tips on how to use them.**

Warm-up and announcement



Joining the scheme, the bulk transfer and welcome journey from Mylo



*Mylo is packed with powerful features and makes it easier than ever to manage your savings. For a few tasks, you'll still be securely directed to your Aegon Retiready online account - it's all done through Mylo, so there's no need to remember extra passwords. Keep an eye out for an email from Mylo with your Retiready account activation code.

Further emails will be sent as part of the welcome journey. This journey isn't strictly linear - the timing and content of emails may vary depending on how each member engages.

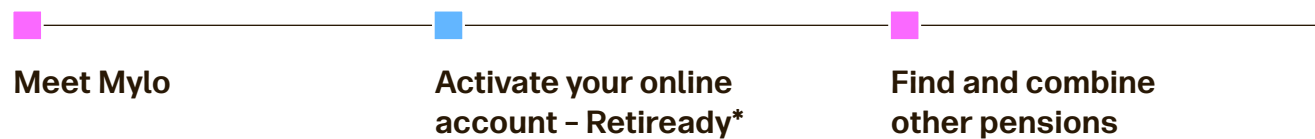
Emails may include:

- Guidance on nominating beneficiaries
- Information about reviewing investments and funds
- Reminders to download Mylo once contributions have been made

Warm-up and announcement



Welcome journey from Mylo



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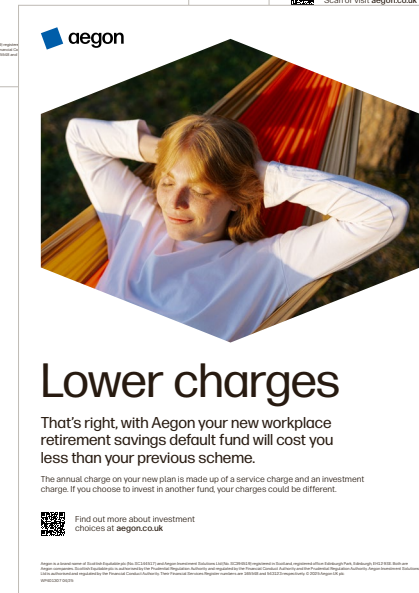
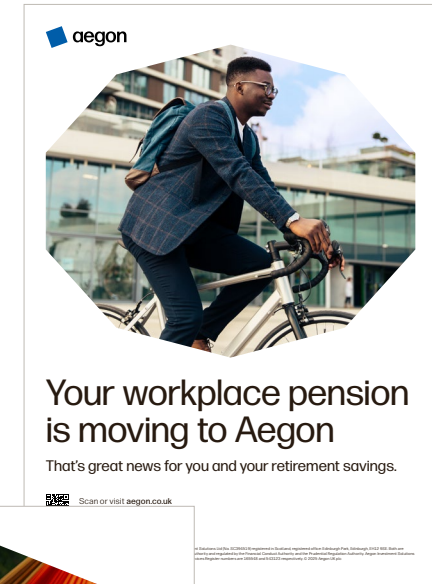
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Introducing your new scheme

Download our posters and flyers

- Welcome to Aegon poster
- Welcome to Aegon flyer
- Your workplace pension is moving to Aegon poster
- Your workplace pension is moving to Aegon flyer
- Lower charges poster
- Lower charges flyer



Warm up and announcement

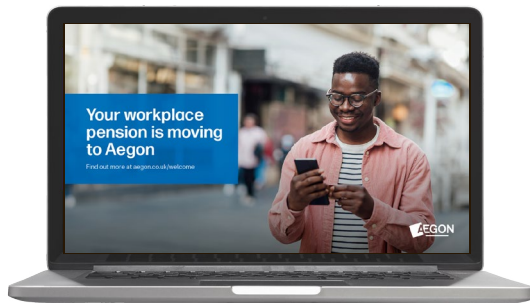
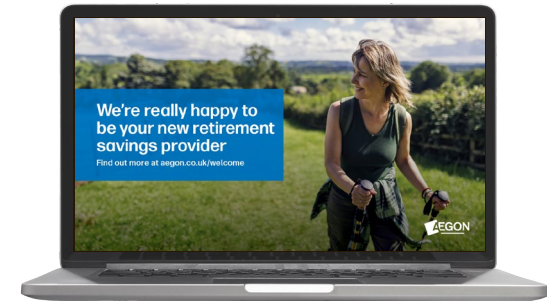
Desktop backgrounds and screensavers

If your employees are never far from a screen, then a desktop background and/or screensaver is perfect. It gives you the opportunity to let them know what's going on with their retirement savings scheme, and point them in the right direction to learn more about it.

1280 x 800 resolution

1356 x 768 resolution

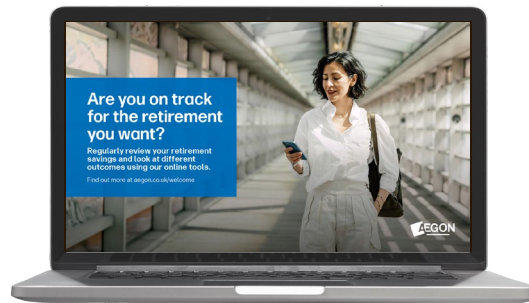
1920 x 1080 resolution



1280 x 800 resolution

1356 x 768 resolution

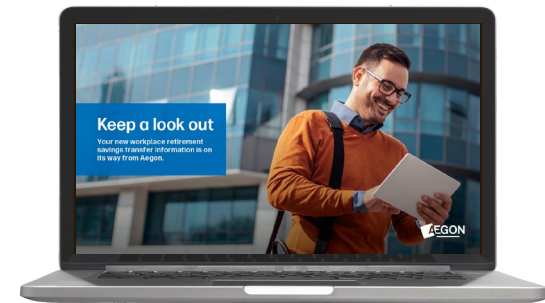
1920 x 1080 resolution



1280 x 800 resolution

1356 x 768 resolution

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1280 x 800 resolution

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Warm up and announcement

Scheme announcement email

To help you communicate the launch of your new workplace pension scheme and introduce Aegon as the provider, we've prepared the following:

Scheme announcement email

We've drafted an email you can send to employees. It includes:

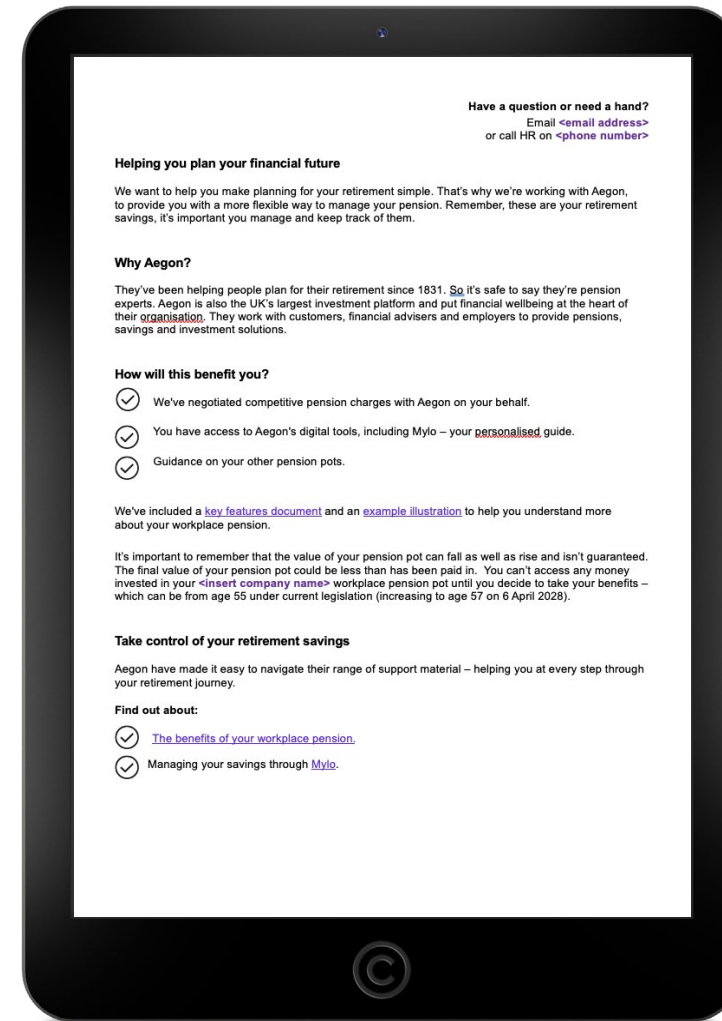
- Key reasons why you may have chosen Aegon
- Links to the required regulatory documents

Scheme information leaflet

This leaflet provides detailed information about your new Aegon pension scheme. Please remember to attach it to your email when sending the announcement.

Make sure to also include:

- Key features
- Example illustration



Warm up and announcement

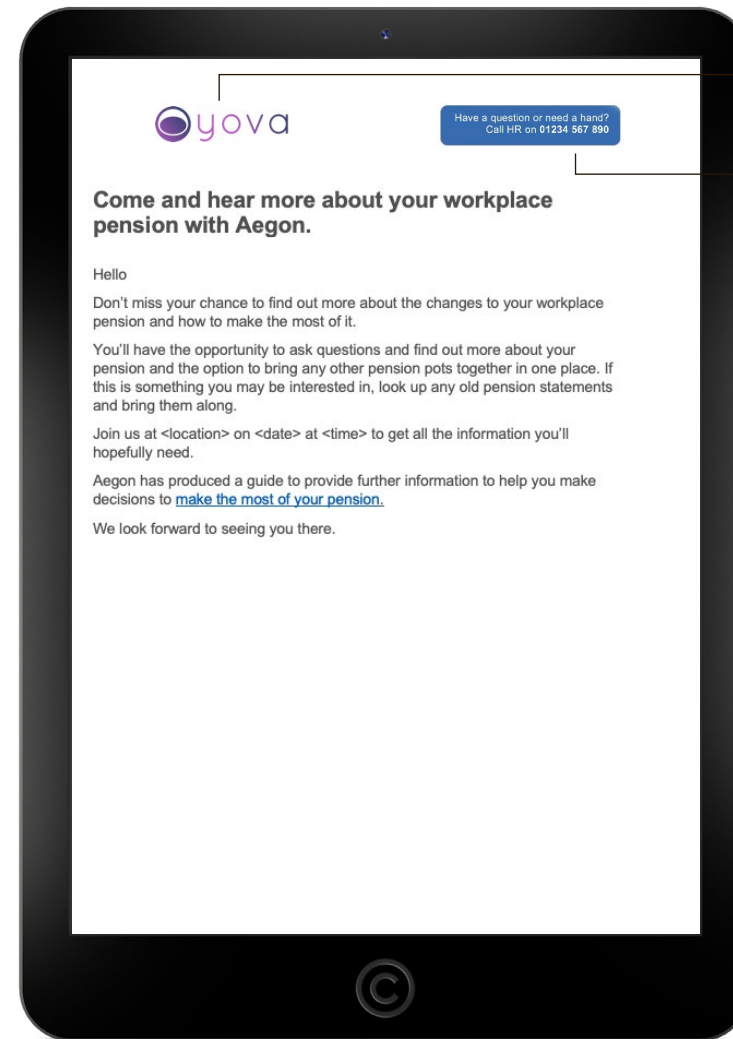
Presentation invitation

We've created editable templates you can send to your employees for when it's time for us to get together and talk about your retirement savings scheme.

Access your editable presentation invitation

It can be easy to miss an email - so here is a reminder, too. You can send this to your employees a little closer to the time of the presentation.

Access the presentation reminder



Simply place your logo here

Add your HR contact details here

Joining the scheme and bulk transfer

Meet Mylo

Mylo gives your employees secure, easy access to view and manage their retirement savings anytime, anywhere.

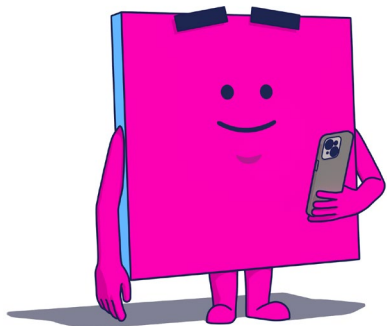
Packed with smart features, practical tips, and intuitive tools, Mylo helps your employees stay informed and in control - making financial planning simpler than ever.

To help you launch Mylo across your workplace, we've created a sample email you can share with employees to get them started.

We've also developed a suite of promotional materials - including an app demonstration video, poster, web banners, and screen savers - to help raise awareness and encourage engagement.

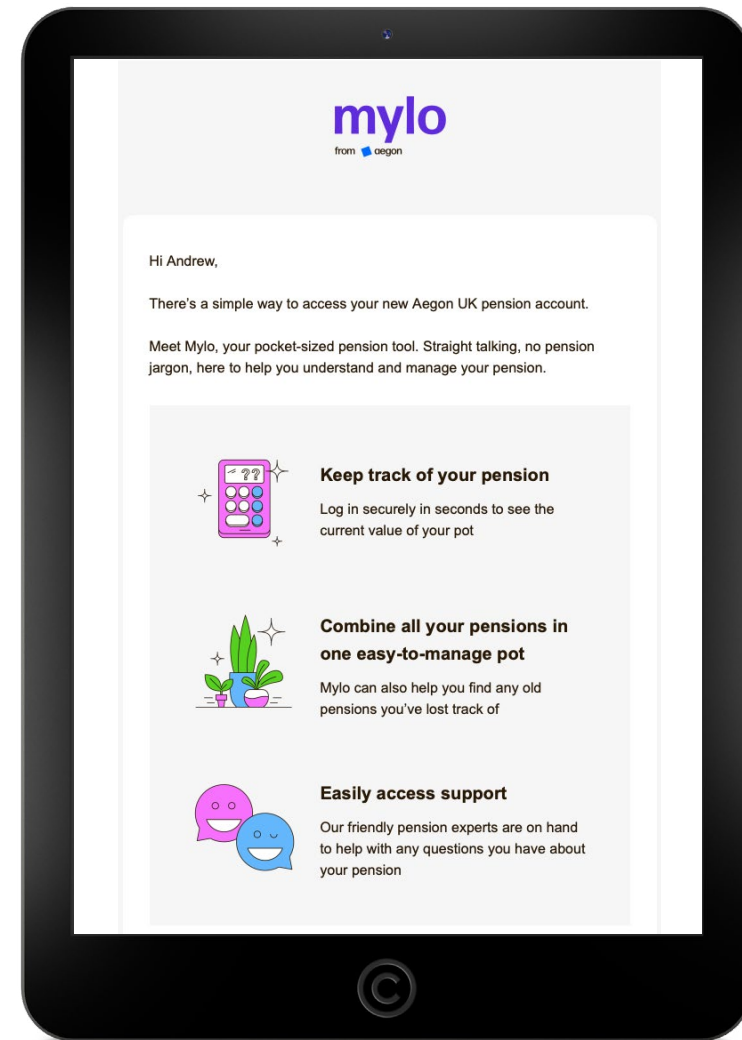
Download our Mylo campaign materials:

- [Toolkit](#)



Employees will receive a warm welcome from Mylo to help your employees get the most out of their savings.

mylo



Joining the scheme and bulk transfer

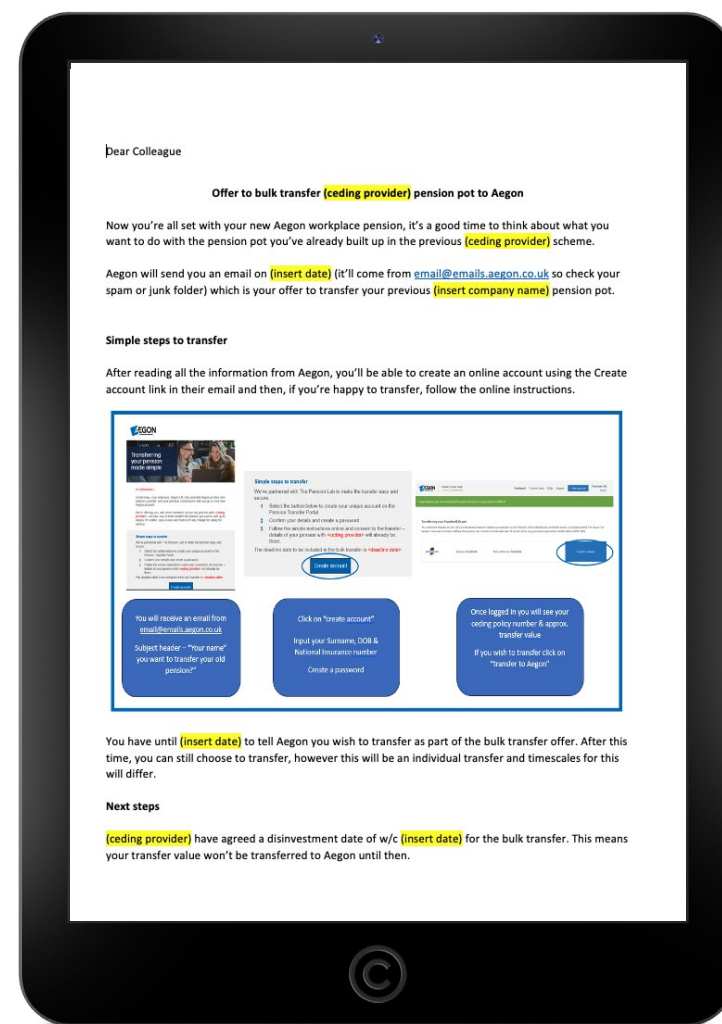
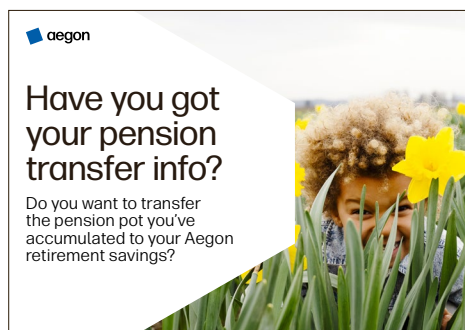
Transfer heads-up promotional assets

It couldn't be easier for your employees to manage their retirement savings and transfer the pension pot they've already built up with your previous provider to Aegon.

The assets below will inform employees that they'll soon receive an email invitation to join the bulk transfer.

Access your items here:

- [Email](#)
- [Poster](#)
- [Flyer](#)
- [Video](#)



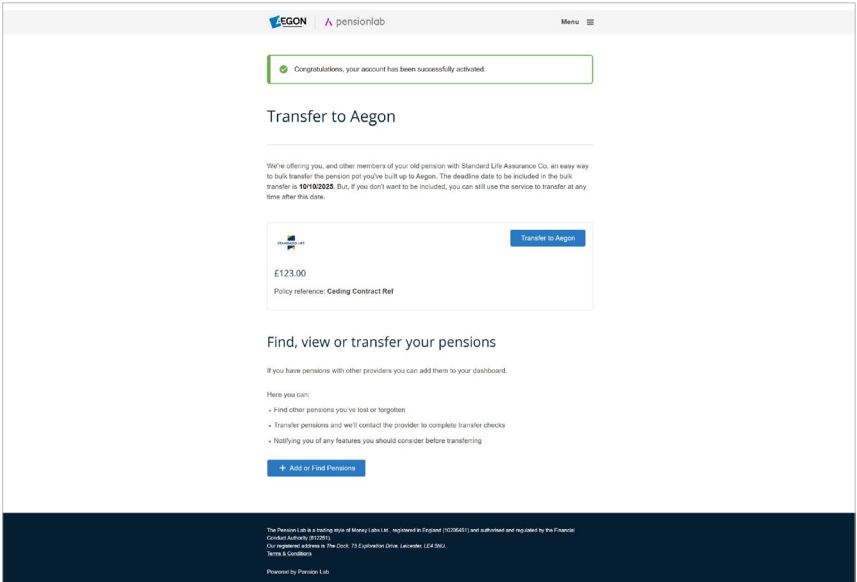
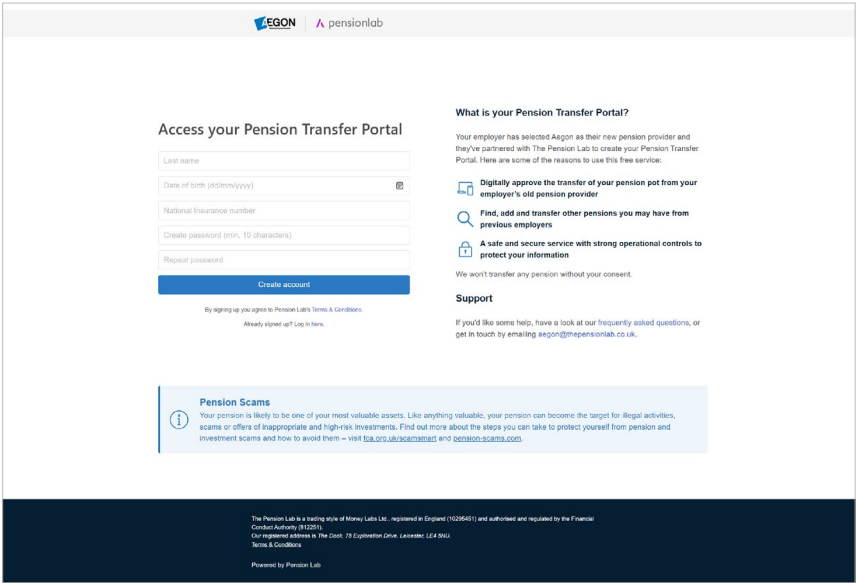
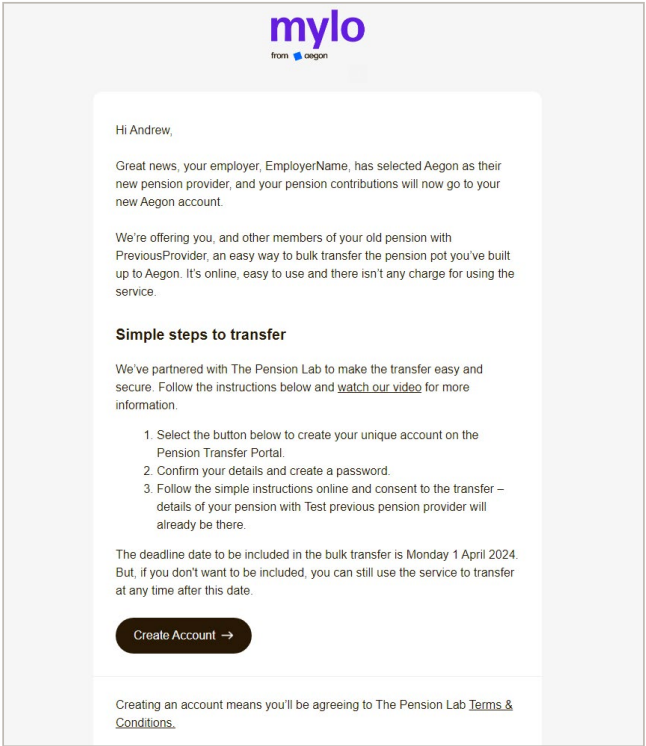
Joining the scheme and bulk transfer

Bulk transfer emails

Employees will receive an email inviting them to be included in the bulk transfer. The message will clearly explain the benefits and highlight key points to consider.

Once employees create an account and log in to the secure transfer portal they can give their consent to the bulk transfer.

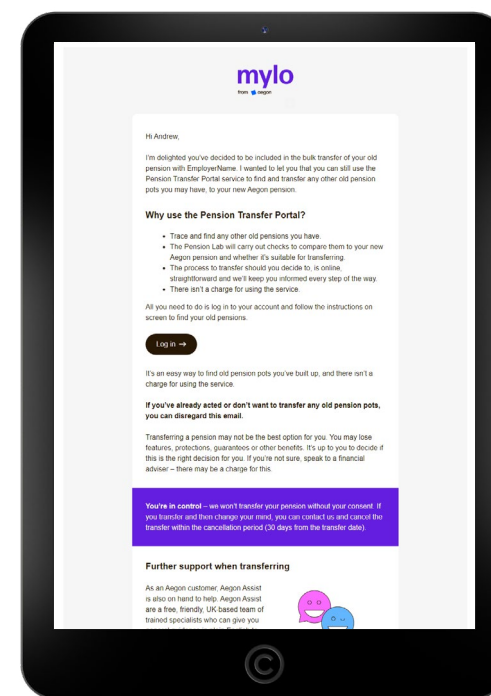
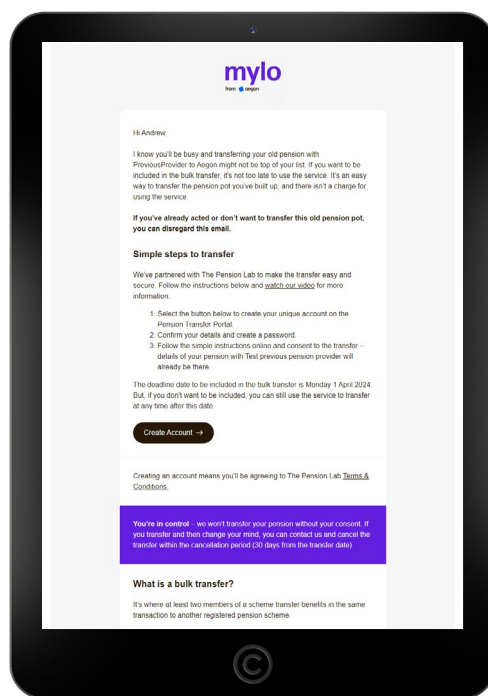
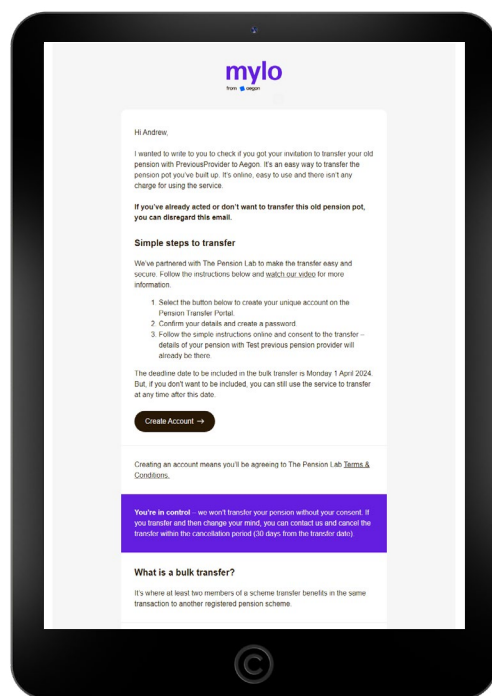
The bulk transfer may not happen immediately after consent is given. Your implementation manager will confirm the transfer date with you.



Joining the scheme and bulk transfer

Transfer reminder emails

A little reminder from Aegon will help your employees understand the potential advantages of having all their workplace savings in one easy to manage place.



Joining the scheme and bulk transfer

Mylo welcome journey

To help your employees get the most out of their savings the Mylo welcome journey will respond to user behaviour to create a bespoke experience. For highly engaged members who complete all actions early, the journey can be as short as two days. For users who need more encouragement, the journey will keep them engaged and can last for several months.

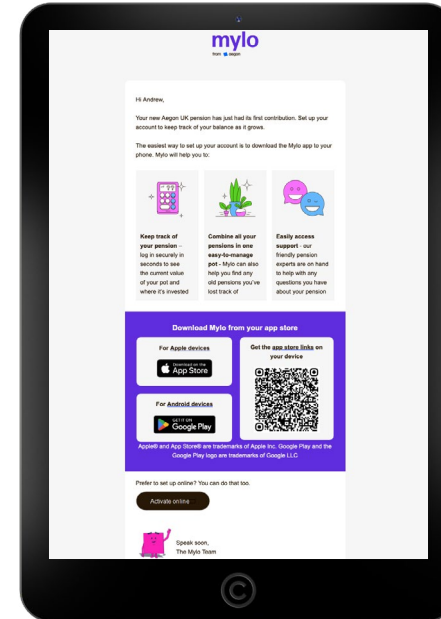
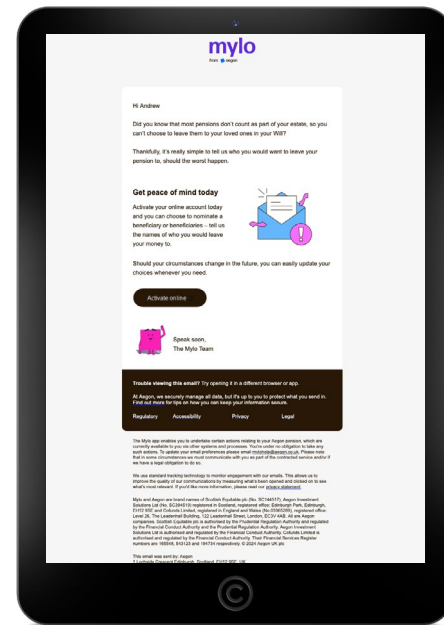
Find and combine pensions

See if bringing your pensions together would be right for you.



Death benefit nomination

It's important to tell us who you'd want to leave your money to should anything happen to you.



Your first pension contribution has landed - set up your account to take a look.



Your pension pot just received another contribution! Activate your account and take a look.

Ongoing support

Keeping members engaged with their retirement saving

Encouraging members to get involved with their retirement savings is crucial to them achieving great outcomes.

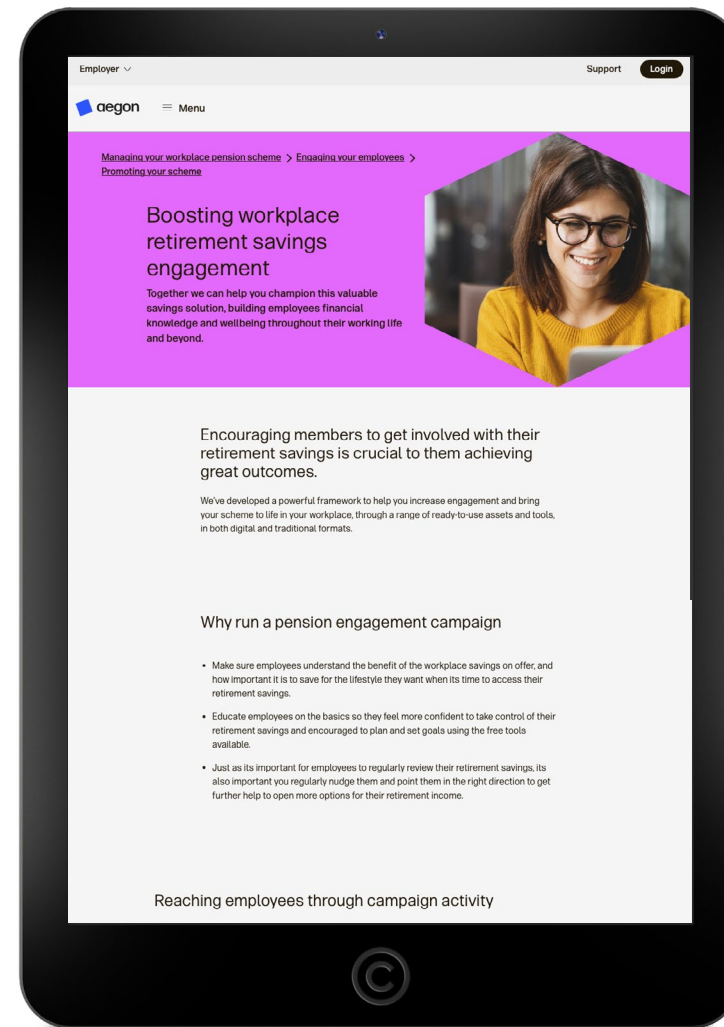
We've developed a toolkit of ready-to-use assets and tools, in both digital and traditional formats, so you can easily run ongoing retirement savings campaigns for your employees.

We've also included some handy hints and tips to help you run your campaign.

- **We've a number of campaigns for you to choose from - take a look**



We've created this email template for new members joining the scheme.

- **Induction email template**



Here to help

**That's just about it, but if you need anything else
we're always on hand, only a call or email away
– just contact your implementation manager.**

aegon.co.uk  [@aegonuk](https://twitter.com/aegonuk)  [Aegon UK](https://www.linkedin.com/company/aegon-uk)

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