



PENSIONSPRO

November 2002 Edition



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1. CONTENTS OF THE SERVICE

PensionsPro is an online subscription service which has been developed to provide a whole new level of information to our current and prospective customers. Going beyond the limitations of traditional paper sources, pensionsPro's online service provides instant access to all the pensions information you are likely to need, 24 hours a day, 7 days a week. At the touch of a button, subscribers can easily access a whole host of comprehensive and up-to-date information and services.

There are four main subscription services: pensionsPro Premium, pensionsPro Essentials, pensionsPro Legal Documents and International Pensions and Benefits. The contents of each are summarised below.

PENSIONS PRO PREMIUM

PensionsPro Premium is designed for those who require detailed legal and analytical information and access to a wide range of materials readily to hand. PensionsPro Premium provides you with the most complete access to the pensionsPro site and an unparalleled host of features and benefits designed to equip you with all the pensions information you are likely to need.

PensionsPro PREMIUM contents:

- News & News Archive

Reference Library and Research Tools:

- Key Pensions Dates
- Hot Topics
- Article Citator
- Pensions Law Reference
- Pensions Administration Factsheets
- Pensions Administration
- FAQs
- Consultation Papers
- Surveys

· UK Legislation and EU Directives:

- Legislation Stop Press
- Statutes
- Explanatory Notes for Acts
- Statutory Instruments
- Scottish Statutes
- Scottish Statutory Instruments
- Is It In Force?
- Historical Legislation Service which enables you to request Statutory Materials as at a certain point in time (back to the beginning of 1998)
- Bill Tracker
- Draft Statutory Instruments
- EU Directives
- Draft EU Directives

· **Cases and Determinations:**

- Daily Case Digests
- OPLR
- All ER
- All ER(EC)
- Pensions Ombudsman Determinations
- Official Transcripts
- Scottish Cases

· **Key Facts and Figures:**

- Tax and NIC Rates
- Tax Office Addresses
- Exchange Rates
- Retail Prices Index
- Pensions Schemes Earnings Cap
- National Average Earnings Index
- State Benefits
- Guaranteed Minimum Pension
- Other Pension-related Figures

· **Inland Revenue Guidance and Forms:**

- IR12 and IR76
- Pensions Updates
- IR SPSS Guidance and Forms
- NICO/CoEG Guidance and Forms
- Stakeholder Schemes
- Personal Pensions
- SSAS
- Statements of Practice
- Tax Forms
- Extra-Statutory Concessions
Model Rules

· **Guidance from Authorities:**

- OPRA
- OPAS
- FSA
- Accountancy Standards
- Institute of Actuaries Guidance Notes
- PMI Glossary of Terms

· **Professional Bodies Update:**

- NAPF
- SPC
- IoA
- PMI
- APL

· **Press Releases** - a table of official press releases

· **E-mail Alerter** - a software tool enabling you to request personalised email alerts

· **Legal Email Helpline** - a helpline service to direct to appropriate areas of the site that may assist you in answering your query

PENSIONS PRO ESSENTIALS

Designed for those who require simple clear-cut information on pensions. Comprehensive and user-friendly guidance is at your fingertips on the day-to-day running of a pension scheme and handling any queries that you may encounter.

PensionsPro ESSENTIALS contents:

- **News & News Archive**

- **Key Pensions Dates**

- **Hot Topics**

- **Forms:**
 - Revenue forms in a fillable format
 - OPRA forms

- **Inland Revenue Guidance:**
 - **IR SPSS/PSO:**
 - IR12 (1979)
 - FSAVC (Supplement to IR12)
 - IR12 (2001) § Pensions Updates
 - IR SPSS Manual
 - IR SPSS Forms
 - Statements of Practice
 - Model Rules

 - **NICO/CoEG:**
 - CA Manuals
 - CoEG Forms

 - **Stakeholder Schemes:**
 - Guidance Notes
 - Forms

 - **Personal Pensions:**
 - IR76
 - IR78

 - **SSAS:**
 - SSAS Guidance Notes

- **Pensions Administration Factsheets**

- **Pensions Administration**

- **Key Facts and Figures:**
 - Tax and NIC Rates
 - Tax Office Addresses
 - Exchange Rates
 - Retail Prices Index
 - Pensions Schemes Earnings Cap
 - National Average Earnings Index
 - State Benefits
 - Guaranteed Minimum Pension
 - Other Pension-related Figures

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· **PMI Glossary of Terms**

· **Press Releases** - a table of official press releases

· **E-mail Alerter** - a software tool enabling you to request personalised email alerts

· **OPRA, OPAS, FSA**

· **Professional Bodies Update:**

- NAPF
- SPC
- IoA
- PMI
- APL

PENSIONSPRO LEGAL DOCUMENTS

The legal documents section of pensionsPro will provide you with all the documents needed for:

- Setting up a scheme
- Running a scheme
- Transfers

PensionsPro LEGAL DOCUMENTS contents:

Setting Up a Scheme

- **TRUST DEEDS** - for setting up different types of schemes e.g. Defined Benefits, Defined Contribution, SSAS, FURBS and UURBS.
- **SCHEME RULES** - for different types of schemes e.g. Defined Benefit and Defined Contribution.

Running a Scheme

- **TRUSTEES** - a variety of deeds of appointment and removal of trustees including appropriate documents for MNTs, independent trustees and professional trustees. Also letters and notices to trustees and employees, election forms and other documents.
- **INTERNAL DISPUTE RESOLUTION PROCEDURE** - an outline of IDRP procedure, an application form, letters to and from trustees, and appropriate scheme rules and booklet entries.
- **INVESTMENT** - statement of investment principles, portfolio agreement for SSAS and an investment management agreement.
- **ADMINISTRATION AND ADVISERS** - appointment of different advisers.
- **CONTRACTING-OUT** - deed schedule and appropriate contracting-out forms.
- **AMENDING SCHEME RULES** - deed of amendment.
- **DEATH** - information form, letter of wishes and deed of appointment and trust in respect of lump sum death in service benefit.
- **CORPORATE TRANSACTIONS** - clauses for merger and acquisition documents and draft schedules.

Transfers

- **TRANSFERS** - deeds of assignment, substitution and merger.

INTERNATIONAL PENSIONS AND BENEFITS

Tolley's International Pensions and Benefits is an online and looseleaf package which brings you a chapter-by-chapter account of the different pensions and benefits within different countries worldwide. The service has been designed to give a first reference source for anyone needing to understand how pensions and benefits operate in other countries around the world. With the inclusion of comparison tables, it will also be possible to compare benefits offered by different countries and the different terminology used.

Initially subscribers will be presented with over twenty chapters representing all the information about pensions and benefits from different countries across the globe. You will then receive three updates per year in looseleaf form together with more regular updates of the online version. The online module includes access to EU Directives and cases, news and e-mail alerter. Each chapter will address the following:

- State benefits
- Employee pensions and benefits
- Pension fund investments
- Transferring personnel
- International contacts

INTERNATIONAL PENSIONS AND BENEFITS contents:

PART 1: International Overview

- Overview
- Management Techniques for International Benefit
- International Comparator Table
- Glossary
-

PART 2: Western Europe

- Western European Overview
- Austria
- Denmark
- France
- Ireland, Republic of
- Italy
- Netherlands
- Switzerland
- United Kingdom

PART 3: Central and Eastern Europe

- Central and Eastern European Overview
- Poland
- Russian Federation

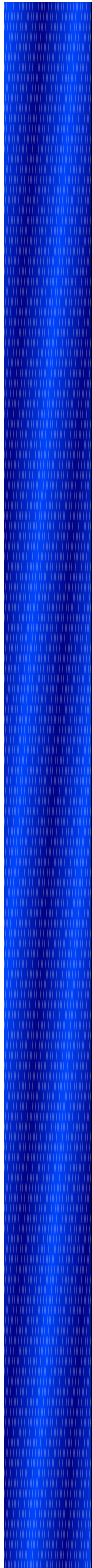
PART 4: North America

- North American Overview
- Canada
- The United States of America

PART 5: South America

- Brazil

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PART 6: Asia

- India
- Singapore

PART 7: Southern Africa

- South Africa

PART 8: Australasia

- Australia

PART 9: Offshore

- Jersey

OTHER ONLINE OPTIONS

The following three online options are also available through pensionsPro:

NAPF Legislation Service

An online option is available for this existing looseleaf service. The online service contains

- Legislation (Statutes, Scottish Statutes, Statutory Instruments and Scottish Statutory Instruments)
- Inland Revenue Guidance and Forms
- Institute of Actuaries Guidance Notes

Pensions Law Service

An online option is available for this existing looseleaf service.

Pensions Administration Service

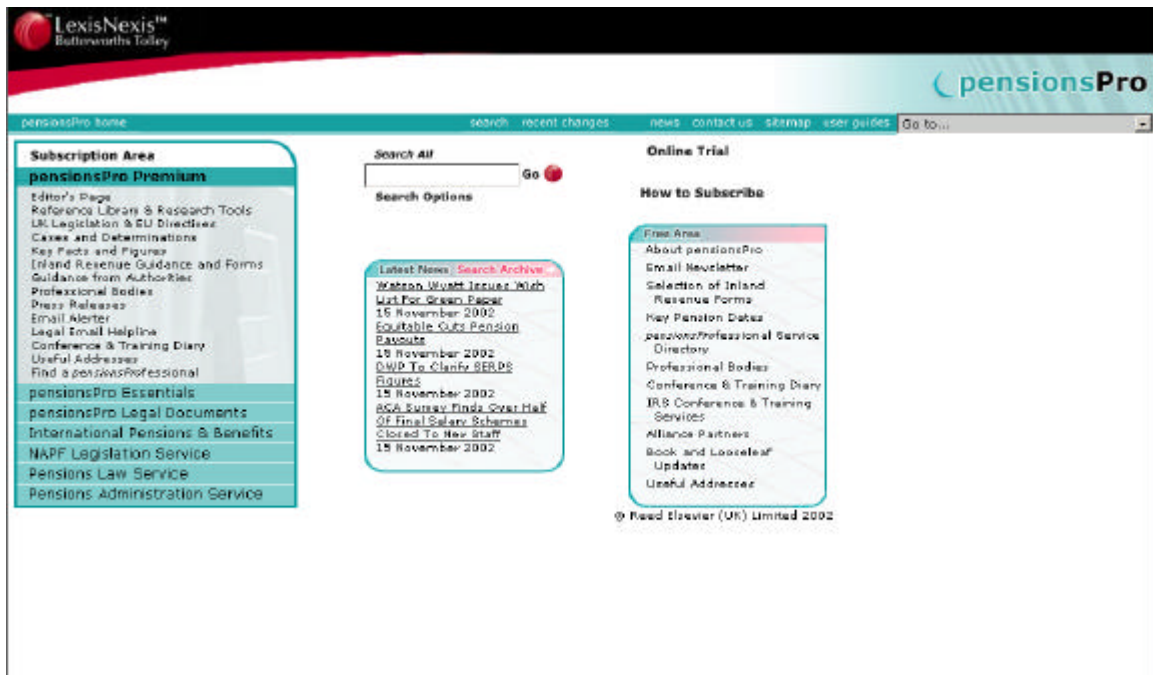
An online option is available for this existing looseleaf service.

2. OPENING THE SERVICE

To access pensionsPro, type 'www.pensionsPro.com' into the Internet address bar, or select 'butterworths services' from the Butterworths LexisNexis Direct home page (single click) and then left click 'pensionsPro', pictured below.



The following screen will be the pensionsPro opening screen, shown below.



Select the Subscription Area you require from the menu on the left hand side of the screen and left click. Each Subscription Area will have a "Free Area" which can be accessed without subscribing. To access the subscription only areas you must login from the login screen which will appear as shown below .

You will be asked to enter your user name and password.

Please provide your user name and password in the boxes below:

User name:

Password:

If you have not subscribed but wish to, click on 'How to Subscribe' (immediately above the Free Area menu) for details.

3. UNIQUE FEATURES

3.1 NAVIGATION BAR



The navigation bar for pensionsPro is shown above. Use the buttons along the bottom of the navigation bar to move around the site. Clicking on 'pensionsPro home' on the bottom left hand side of the bar will return you to the frontpage.

3.2 BOOKS ON SCREEN [BOS]

"Pensions Law Reference", "Legislation", "Cases", "Inland Revenue", "PMI Glossary of Terms" and "Pensions Administration" all use books on screen software.

For information on books on screen, searching and print management, please refer to the Direct Services User Manual which can be located on the Online Product Manuals page.

3.3 HOTDOCS

Users can access Inland Revenue forms from a comprehensive list on pensionsPro. All of the fillable forms on pensionsPro utilise HotDocs form filling software.

In order to access these forms the HotDocs software must first be downloaded. This can be done directly from the site, and the option to download HotDocs appears on the pages from which the individual form files are run.

3.4 SITEMAP

Users may also navigate pensionsPro by using the sitemap. The sitemap can be accessed by left clicking once the sitemap button on the navigation bar.

The pensionsPro sitemap is shown below. Areas can be accessed by left clicking on the required section.

pensionsPro Free Area	pensionsPro Premium	pensionsPro Essentials
<p>pensionsPro home Search Options Recent changes News Contact us User guides pensionsPro Premium pensionsPro Essentials pensionsPro Legal Documents NAPF Legislation Service pensions Law Service pensions Administration Service</p>	<p>Editor's Page Reference Library and Research Tools Inland Revenue Guidance & Forms UK Legislation & EU Directives Cases and Determinations Key Facts and Figures IR Guidance and Forms Guidance from Authorities Professional Bodies Press Releases Email Alerter Legal Email Helpline Conference & Training Diary Useful Addresses Find a <i>pensionsProfessional</i></p>	<p>Editor's Page Key Pensions Dates Hot Topics Forms Inland Revenue Guidance Sheets Pensions Admin Checklists Pensions Administration Key Facts & Figures PMI Glossary of Terms Press Releases Email Alerter OPRA OPAS FSA Professional Bodies Conference & Training Diary Useful Addresses Find a <i>pensionsProfessional</i></p>
pensionsPro Legal Documents	International Pensions & Benefits	Pensions Law Service
<p>Part A Documents To Set Up A Scheme Part B Running The Scheme Part C Transfers About pensionsPro Premium About pensionsPro Essentials</p>	<p>International News International Pensions & Benefits EU Directives EU Cases Email Alerter International FAQs</p>	<p>About this service Pensions Law</p>
Pensions Administration Service	NAPF Legislation Service	
<p>About This Service Pensions Administration</p>	<p>About this service Pensions Legislation Inland Revenue Guidance & Forms IoA Guidance Notes</p>	

4. OTHER INFORMATION

4.1 EDITORIAL

If you have a query about the content of the pensionsPro service, you can contact us by telephone or E-mail. Simply contact the editor, Martin Lavender, on 0845 608 1188 ext 5470 or email him using the address Martin.Lavender@lexisnexis.com. We welcome feedback from our customers about pensionsPro so please feel free to contact us, or to complete the feedback form on the pensionsPro home page.

4.2 TECHNICAL SUPPORT

Telephone support is available during normal working hours (09 00 – 17 00 GMT)

Tel: (44) 0845 305 0500 Fax: (44)01483 257917

To assist the help line in resolving your problems as quickly as possible please have the following information to hand before calling

- What Internet browser are you using?
- What product do you subscribe to?
- Do you have a network or standalone PC?
- If you are on a network what type is it? (i.e. Novell, NT etc.)
- Which version of DOS are you using?
- Which version of Windows are you using?
- What was the sequence of events leading up to your problem?

Support for our on-line services is also available:

09 00 – 17.00 Monday to Friday

08 00 – Midnight Saturday and Sunday on-line at:

<http://www.butterworths.co.uk/content/support/techsupport.htm>

Or E-mail: online.support@butterworths.co.uk

4.3 CUSTOMER SUPPORT

Butterworths Direct Help line is available from Monday to Friday 09 00 – 17 00

Tel: 0845 608 1188

For calls from outside the UK: +44 0207 400 2822



4.4 TRAINING

To find out more about our comprehensive training courses, and to reserve a place.

Tel: (44) 0207 400 4639

E-mail: training@butterworths.co.uk