1. A guide to the application process

Payroll deduct
Step 1. Please select your preferred payment method

Step 2. Complete sections 3, 4, 5 and 6 of this application form.

Step 3. Employees and their partners, wishing to take out a plan need to complete the employee application forms and return them to you.

Step 4. Collate the employee application forms, retaining each authority for deduction from pay, and populate the One Fund spreadsheet.

Step 5. Return this employer form and the employee application forms to: The Exeter, Jewry House, Jewry Street, Winchester, Hampshire, SO23 8RZ.

Employee Direct Debit
Step 2. Complete section 3 and 4 of this application form.

Step 3. Employees and their partners who wish to take out a plan need to complete an employee application form and return it to you.

Step 4. Return this employer form and the employee application forms to: The Exeter, Jewry House, Jewry Street, Winchester, Hampshire, SO23 8RZ

If you are using an intermediary, please also ensure that their details are provided in section 7.

2. What happens next?

Payroll deduct
Once we have received all of the necessary information:

• The Exeter will process each application and send you confirmation of the Direct Debit value and a full list of employees/partners who have chosen to take out a plan

• The Direct Debit will be set up for the 1st of the month following the initial salary deductions

• Welcome packs will be sent to each applicant.

Employee Direct Debit
Once we have received all of the necessary information from your employees:

• The Exeter will process each application form and send welcome packs to each applicant.

3. Commencement date

Payroll deduct
The Direct Debit will be arranged for the 1st of the month following the initial salary deductions and cover under the plan will begin on this date. The application forms and spreadsheet must be returned to The Exeter no later than 3 weeks prior to the 1st of the month for which cover is to begin.

Employee Direct Debit
Please state which month you would like to start the One Fund scheme for your employees:

Start Date

Date of 1st planned salary deductions

On the 1st day of the month following your initial salary deductions the Direct Debit will be made and your employees’ cover under the plan will begin.
4. Company details

Company Name*  

Company Address*  

Postcode*  

Name of company representative*  

Email address of company representative*  

*This information is mandatory.

5. Declaration – Payroll deduct

I agree to make deductions from employee salaries, in order to collect the premiums, and pay them to The Exeter via Direct Debit.

Signature  

Date  

Print name  

Position in company  

6. Instruction to your bank or building society for Payroll deduct

To be completed by an authorised signatory for your company’s bank account.

Please fill in the whole form using a ballpoint pen and send to: The Exeter, Jewry House, Jewry Street, Winchester, Hampshire, SO23 8RZ

Name and full postal address of your bank or building society  

Service User No. 444237  

Reference number – for office use only  

For The Exeter official use only. This is not part of the instruction to your bank or building society  

Name(s) of account holder(s)  

Bank/building society account number  

Branch sort code  

Instruction to your bank or building society.

Please pay Wessex Administration Services Ltd Re The Exeter Cash Plan Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. 

I understand that this Instruction may remain with Wessex Administration Services Ltd Re The Exeter Cash Plan and, if so, details will be passed electronically to my bank/building society.
This Guarantee is offered by all banks and building societies that accept
instructions to pay Direct Debits.

If there are any changes to the amount, date or frequency of your Direct
Debit Wessex Administration Services Ltd Re The Exeter Cash Plan will notify
you 10 working days in advance of your account being debited or as
otherwise agreed. If you request Wessex Administration Services Ltd Re
The Exeter Cash Plan to collect a payment, confirmation of the amount
and date will be given to you at the time of the request.

If an error is made in the payment of your Direct Debit, by Wessex
Administration Services Ltd Re The Exeter Cash Plan or your bank or building
society, you are entitled to a full and immediate refund of the amount paid
from your bank or building society. If you receive a refund you are not entitled
to, you must pay it back when Wessex Administration Services Ltd Re The
Exeter Cash Plan asks you to.

You can cancel a Direct Debit at any time by simply contacting your bank or
building society. Written confirmation may be required. Please also notify us.

7. Intermediary details

Where applicable, please provide your third party intermediary’s details

Broker name

Firm

Firm address

Postcode

Financial Conduct Authority no.
Contact us

The Exeter, Jewry House, Jewry Street, Winchester, Hampshire, SO23 8RZ

Customers
0300 123 3256

cashplan@the-exeter.com

Financial Advisers
0300 123 3257

cashplan.adviser@the-exeter.com

www.the-exeter.com