

SOVEREIGN INTERNATIONAL RETIREMENT & SAVINGS SCHEME (SIRSS)

PRODUCT FACT SHEET

POPULATION TYPE



- Third Country Nationals »
- Internationally Mobile Employees
- Expatriates
- Local Nationals (additional tier)
- ~ Offshore or contract staff

INVESTMENT TYPES



- Invest for me: Target dated Funds »
- Help me invest: Multi-Asset Portfolios
- Do it myself Self-select Fund Range

STRUCTURE AND LICENCE LOCATION



Master Trust Guernsey

FLEXIBLE PLAN RULES



- Choice of:
- Currency (\$, €, £)
 - Eligibility »
 - Vesting options
 - Contribution types and benefit level »
 - Optional partial withdrawals

SERVICING



Straight through processing via:

- Employer Self-Service portal (ESS)
- Member Self-Service portal (MSS)



CUSTOMER SERVICE

- **HR** Support
- Sovereign Representative to talk to

EMPLOYEE MEMBER ENGAGEMENT AND KNOWLEDGE HUB



Multi-lingual Financial Wellness portal:

- 60+ Languages
- Calculators
- Quizzes »
- Videos



Knowledge Hub:

- Fund Information
- Helpful Guides

Plan engagement:

- » Branded/tailored Employee Booklet
- Launch Presentations

Let us help you. The Sovereign Group is one of the largest global trust companies and pension experts with offices in over 20 countries. It is well regulated and an expert in its field.

Interested?

Please contact: Mrs Jo Smeed, International Employee Benefit Executive Email: JSmeed@SovereignGroup.com Tel: + 44 (0)1481 811000

PRE-PROPOSAL QUESTIONNAIRE

SIRSSPFSF/3/01062023

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