

Multiple Income Customer Strategy

Feedback from the Individual Stakeholder Forum workshop - Thursday 6 March 2008

Information via Employers & Pension Providers

- Employers & Pension Providers buy in
- Employer obligation to explain payslips
 - Correct calculations?
- Lone Parents → challenge with 'types of employment' - flexible/casual.
Smaller businesses/different industries need to be targeted to ensure that we can capture key customer groups
- Employer responsibility a key point
 - Link to the P2
- Single P2 = idea!!
- How can customers make sure their Tax code is correct?
- Customers ↑ likely to trust new style SO ↑'s risk they will assume tax code is correct. Need to ensure that they still check and know how to check
- HMRC = encourage relations with HR. Pay/HR = not separate

P161

- Issue: 'You won't get the allowances you're entitled to' letter must explain why it's good
- Joint = Department for Work and Pensions (DWP) collection!
- Calls recorded and indexed? Evidence of what is said
- Timing: trigger when you actually start pension
- P161(W) more difficult – good to pilot this too
- If you don't have another pension you'd be in Self Assessment
- Make sure that we test draft letters with Individuals Stakeholder members