

# TRANSFORMING PENSION ENGAGEMENT

Empowering Wilkin Chapman Rollits employees with financial confidence

## About

Wilkin Chapman Rollits is the largest law firm in Lincolnshire and Yorkshire. With over 500 partners and staff across a network of locations in Grimsby, Lincoln, Louth, Hull, York and Beverley, the firm provides trusted legal and insolvency advice to both private and commercial clients.

## The driver for change

As part of their people strategy and annual benefit review, Wilkin Chapman Rollits wanted to secure a pension provider that not only offered great investment options, but also one that fully engaged with employees to support their financial planning. They wanted a provider who could offer financial education for the entire workforce, with a strong emphasis on governance and scheme performance. This prompted a full pension review in 2022.

During the Covid pandemic, HL Workplace ran stand-alone, online financial wellbeing sessions for employees at Wilkin Chapman Rollits on the following topics:

- Introduction to Investing
- Budget and Debt Management
- Building Financial Resilience
- Planning for later life, 50+

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HL were very knowledgeable and professional throughout the financial wellbeing sessions they provided. It was a great service. When we came to review the pension in 2022, I was keen for us to include HL in the selection process for a new pension provider. Given our previous working relationship, I knew they provided a financial one-stop shop and we wouldn't just be getting a pension. We would be getting free financial wellbeing sessions as part of the package and we didn't need a broker to access their products.



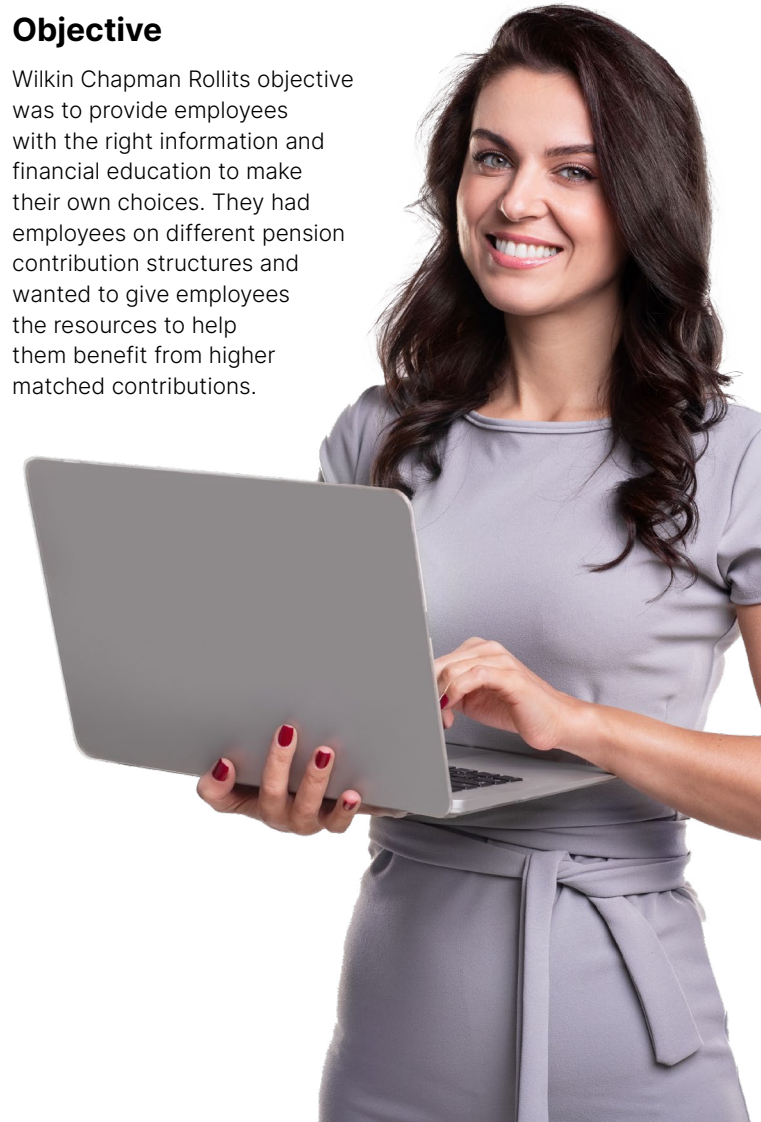
**TRACY ROBERTS**  
HR Manager – Wilkin Chapman Rollits



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## Objective

Wilkin Chapman Rollits objective was to provide employees with the right information and financial education to make their own choices. They had employees on different pension contribution structures and wanted to give employees the resources to help them benefit from higher matched contributions.



## Implementation

HL Workplace provides a dedicated Implementation Manager to fully manage the transition for every new client. Once the pension has launched, one of our experienced Client Relationship Managers takes over for ongoing support.

- **318 employees joined the HL pension scheme** at launch with 29% of employees on salary sacrifice. As of March 2025, this has increased to 48% of employees on salary sacrifice, including new starters who've since joined.

"The transition to HL was smooth and very professional. Breaking ties with our existing broker was understandably delicate and HL supported us throughout the process. They made it easy."

### TRACY ROBERTS

HR Manager – Wilkin Chapman Rollits

## Financial wellbeing

At the launch of the new pension in August 2023, HL tailored financial education to the needs of their employees, providing:

- **13 days of remote financial wellbeing** sessions with 155 employees attending the presentations
- **1-2-1 meetings for 81 employees**
- bespoke and branded communications for Wilkin Chapman Rollits to send to employees
- monthly newsletters including upcoming webinars on a variety of financial wellbeing topics

"We feel that HL has really supported us with the launch communications and worked tirelessly with us to tailor them to our audience. They even ran additional financial wellbeing sessions as the first wave was so oversubscribed."

### TRACY ROBERTS

HR Manager – Wilkin Chapman Rollits

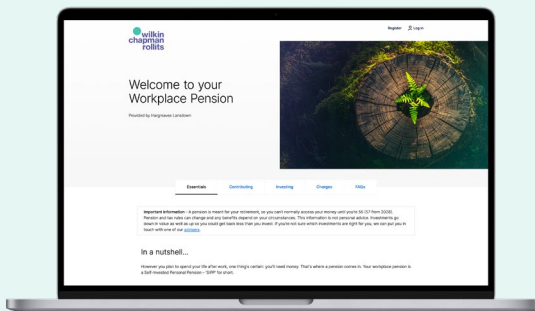
In 2024, HL ran further financial wellbeing sessions for new employees that included:

- **Four days of remote financial wellbeing** sessions with 22 employees attending the presentations
- **Individual 1-2-1 meetings for 22 employees**

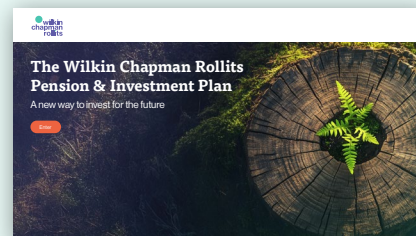
HL also ran a campaign to reduce the amount of uninvested cash in employees' pensions. Uninvested cash went from 22% of scheme assets in January 2024 to 8% of scheme assets by July 2024.

## Bespoke Communications

### Member website



### eGuide



### 'New Hire'



The results – improved engagement scores at Wilkin Chapman Rollits

	Jan-24	May-25
Made an investment outside of the default	3%	6%
Transferred in another pension	20%	28%
Registered to view account online	53%	62%
Set up a nominated beneficiary	24%	29%

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When Wilkin Chapman Rollits launched their new pension with us, they had three different contribution structures for employees. Since then, many have uplifted their contribution basis and 48% are now on salary sacrifice, achieving one of their big goals of switching pension provider.



**ALEXANDRA HARRIS**  
Implementation Manager – HL Workplace

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It’s been a real pleasure working with the team at Wilkin Chapman Rollits and refreshing to see an employer with such a keen focus on employees’ engagement with their workplace pension. This approach will give members a great opportunity to meet their retirement saving goals.



**ALEXANDER DEEVEY**  
Client Relationship Manager – HL Workplace

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Since making the important decision on behalf of our employees to move to HL we have received a first-class service. This has continued throughout the transitional period and beyond. We have seen very positive changes in the proactive engagement with our teams, the individual choices now available to them and the overall pension provision. This has been a very successful process, made even easier by the fantastic team at HL.



**LOIS GORRY**  
Director of HR – Wilkin Chapman Rollits

If you’d like to get in touch please email [workplace@hl.co.uk](mailto:workplace@hl.co.uk).