



## service standards

### NEW BUSINESS

Preparation of illustrations & issue of application pack	24 hours
Acknowledging receipt of a SIPP application	24 hours
Processing new SIPP application	5 days *
Issuing policy documents	5 days

### EXISTING BUSINESS & GENERAL ADMIN

Banking cheques & Telegraphic transfers	Same day received
Preparing projections	24 hours
Dealing with enquiries	95% answered within 5 days

### PROPERTY & INVESTMENTS

Instructing solicitors re property transactions	3 days (if SIPP established)
Writing to lender with SIPP details	3 days (if SIPP established)
Completing legal property documentation	3 days
Dealing with technical enquiries	95% answered within 5 days
Investment transactions	1 day
Preparing ad hoc Investment valuations	7 days

### RETIREMENT

Processing and payment of pension benefits (NB. pension payments made at end of each month)	5 days *
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*\*provided correct documentation received*

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