



WHITEHALL

whitehallgroup.co.uk

SIPP and SSAS: Service Level Report September 2024



1. Introduction

Our levels of service are a core element of the products we supply. We pride ourselves in the quality of our service and continually strive to maintain and improve the service we provide to customers and advisers.

We monitor our performance against expected turnaround times in a range of key areas to measure whether we are performing to the level expected. This enables us to spot any trends and address these quickly to ensure our standards do not slip. Our monthly performance is reported and published on our website.

We always recommend you take advice from a regulated financial adviser before making any decisions with your pension fund. If you don't have an adviser, details of local firms can be found at www.unbiased.co.uk

Should you need support in the event of a vulnerability, please don't hesitate to contact us. We have a team of specialists available to help you.

2. Summary of Target Service Levels

	1 Day	2 Days	3 Days	4 Days	5 Days
Investments					
Conventional Investments & Bank Applications		●			
Esoteric Investments					●
Cheques and Invoices	●				
Loans				●	
Unquoted Shares					●
Commercial Property				●	
VAT				●	
Scheme Structure					
New Employer		●			
New Member		●			
New Schemes and Scheme Benefits					
Retirement*				●	
Death**					●
Transfers-in*		●			
Transfers-out*		●			
New SSAs and Takeovers***		●			
General Work					
Banking Tasks	●				
Valuations and Statements	●				
Introducers Terms of Business				●	
General Post					●
Regulators Correspondence					●

*Where we have all required documents and valuations **Where we have also verified the beneficiaries *** Work is done in stages

3. Service Levels Achieved September 2024

	SSAS	SIPP
Investments		
Conventional Investments & Bank Applications	85%	100%
Esoteric Investments	100%	N/A
Cheques and Invoices	81%	100%
Loans	41%	N/A
Unquoted Shares	100%	N/A
Commercial Property	70%	100%
VAT	58%	100%
Scheme Structure		
New Employer	88%	N/A
New Member	75%	100%
New Schemes and Scheme Benefits		
Retirement	88%	100%
Death	33%	100%
Transfers-in	73%	100%
Transfers-out	76%	100%
New SSASs and Takeovers	70%	N/A
General Work		
Banking Tasks	68%	100%
Valuations and Statements	98%	100%
Introducers Terms of Business	100%	100%
General Post	79%	100%
Regulators Correspondence	66%	100%

If you have any queries regarding these guidelines, please get in touch.

Whitehall Group
8-10 Bolton Street
Ramsbottom
BL0 9HX

Contact Us:

Telephone: 03302 232300

Email: ssas@whitehallgroup.co.uk

Email: sipp@whitehallgroup.co.uk



Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294), Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590), Whitehall Group SIPP Limited, a company registered in England and Wales (Registered number 13577749) and Whitehall SIPP Trustees Limited, a company registered in England and Wales (Registered number 13587700). All companies have their registered office at 8-10 Bolton Street, Ramsbottom, BL0 9HX.

Whitehall Group SIPP Limited is authorised and regulated by the Financial Conduct Authority (FCA) firm reference number 978183.