



WHITEHALL

whitehallgroup.co.uk

SIPP and SSAS: Service Level Report September 2025



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 2025

	SSAS	SIPP
Investments		
Standard Investments & Bank Applications	93%	100%
Non-Standard Investments	100%	N/A
Cheques and Invoices	96%	100%
Loans	88.5%	N/A
Unquoted Shares	100%	N/A
Commercial Property	99.25%	96.43%
VAT	96.5%	93%
Scheme Structure		
New Employer	83%	N/A
New Member	100%	74.16%
New Schemes and Scheme Benefits		
Retirement	89.5%	100%
Death	100%	100%
Transfers-in	25%	86.61%
Transfers-out	91%	100%
New SSASs and Takeovers	96.5%	N/A
General Work		
Banking Tasks	64%	84.81%
Valuations and Statements	93.5%	66.67%
Introducers Terms of Business	100%	100%
General Post	90%	100%
Regulators Correspondence	91.5%	100%

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

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