



WHITEHALL

whitehallgroup.co.uk

SIPP and SSAS: Service Level Report January 2026



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 January 2026

	SSAS	SIPP
Investments		
Standard Investments & Bank Applications	91.5%	100%
Non-Standard Investments	100%	N/A
Cheques and Invoices	93%	100%
Loans	75.5%	N/A
Unquoted Shares	100%	N/A
Commercial Property	67%	66.22%
VAT	95.5%	91.46%
Scheme Structure		
New Employer	67%	N/A
New Member	50%	61.75%
New Schemes and Scheme Benefits		
Retirement	72%	100%
Death	75%	100%
Transfers-in	100%	100%
Transfers-out	82%	100%
New SSAs and Takeovers	83.5%	N/A
General Work		
Banking Tasks	77.5%	76.38%
Valuations and Statements	89%	100%
Introducers Terms of Business	100%	100%
General Post	76%	73.38%
Regulators Correspondence	97.5%	100%

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

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