



WHITEHALL

whitehallgroup.co.uk

SIPP and SSAS: Service Level Report April 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 April 2026

| | SSAS | SIPP |
|--|--------|--------|
| Investments | | |
| Standard Investments & Bank Applications | 91.67% | 100% |
| Non-Standard Investments | 66.67% | N/A |
| Cheques and Invoices | 84.05% | 59,87% |
| Loans | 71.44% | N/A |
| Unquoted Shares | 100% | N/A |
| Commercial Property | 92.09% | 54.22% |
| VAT | 98.4% | 78.69% |
| Scheme Structure | | |
| New Employer | 100% | N/A |
| New Member | 100% | 56.67% |
| New Schemes and Scheme Benefits | | |
| Retirement | 80% | 100% |
| Death | 100% | 100% |
| Transfers-in | 100% | 100% |
| Transfers-out | 95% | 100% |
| New SSASs and Takeovers | 100% | N/A |
| General Work | | |
| Banking Tasks | 85.28% | 58.91% |
| Valuations and Statements | 74.63% | 100% |
| Introducers Terms of Business | 100% | 100% |
| General Post | 78% | 100% |
| Regulators Correspondence | 97.22% | 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:

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