

SSAS minimum Service Standards

TPSG is committed to providing exceptional levels of service to all its Clients and business partners. As well as going the extra mile to find the right solution for Financial Advisers and their Clients, we have carefully designed our administration systems to ensure that we excel at getting things done, when and how Clients want them done.

This document sets out our minimum standard of service, but it should be noted that in many cases we will exceed these processing times and that where we are unable to, it will be due to circumstances beyond our control. Under such circumstances we will always keep all relevant parties fully informed of progress.

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If you need assistance,
please call us:
01249 280020

Process	Turnaround time
New SSAS Processing applications, setting up database records, preparing relevant documentation	3 days
Banking Banking all cheques received All other bank related processes e.g. opening accounts, checking bank statements, investigating missing rental payments etc	Same day 3 - 10 days
Standard investments Purchase/sale of general investments such as Trustee Investment Plans, Unit Trusts, Shares	Same day
Legal documentation – property and loans Contracts, transfer deeds, leases, facility letters, legal charges etc	Same day
Transfers All requests to transfer funds or assets into or out of the SSAS	3 Days
Property purchase transactions, including leases and borrowing Issuing property information schedule and/or borrowing information schedule, liaising with solicitors, lenders, surveyors etc	3 Days
Loan transactions Issuing loan application, preparing the loan agreement and any supplementary documentation, liaising with solicitors and other professional advisers where necessary	3 Days
Requests for information All requests for general information, SSAS investments or possible future transactions	3 Days
Correspondence relating payment of benefits Requests for benefits to be paid or benefit calculations	3 Days
Projections and calculations Requests for actuarial projections and calculations	3 Days



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This list is not exhaustive as there are too many individual tasks for us to list them all. However, it is representative of a cross section of tasks that we will carry out on most if not all SSAs. **The number of days noted relates to the time we may take, from receipt, to deal with a specific piece of post or a phone call.** It is not a guide to how long the whole process takes, e.g. a property purchase cannot go from an interest to invest to ownership in three days, but we can commit to dealing swiftly with any correspondence relating to the purchase.

If you would like to know more about our Service Standards, please call one of the team on 01249 280020; we're here to help.