

## THE CURTIS BANKS SSAS

### Service Levels

Curtis Banks Limited employs knowledgeable and experienced staff and provides a high level of service. As part of our commitment to maximise service levels, we maintain a schedule of service level standards, and monitor our performance against these standards.

In setting our service levels, we take account of our own capability and the service standards of our competitors. Our aim is to set times for processing work which are among the best in our industry and ensure that a high level of care is taken in all the work we carry out.

Our service level standards (in working days) for the main items of work are set out below. Details of service levels for other areas of work can be supplied on request.

#### New Business

		Notes
Issuing a SSAS application pack	same day	
Acknowledging receipt of a new SSAS	same day	
Processing a new application	within 2 days	1

#### Transfers

Processing transfer forms	within 2 days	1
Paying cash transfer-out	same day	1, 2

#### Banking

Paying in cheques and transfers	same day	
Paying out cheques and transfers	same day	2

#### Quoted Investments

Processing purchase/sale forms	same day	1
Issuing payment for purchase	same day	1, 2

#### Property Investment

Agreeing purchase in principle	within 2 days	1
Agreeing suitability of property valuation	within 2 days	1
Agreeing suitability of borrowing	within 2 days	1
Confirming instructions to solicitors and lenders	within 3 days	1
Completing legal documentation	within 2 days	1
Dealing with technical queries	within 4 days	
Transferring funds for purchase	same day	1, 2

#### Retirement

Acknowledging request	same day	
Processing and paying lump sum	within 5 days	1
Processing of pension payroll	before next monthly pay date	

#### General Administration

Requests for information	same day	
General enquiries	within 5 days	

Notes: 1 provided correct documentation/information received  
2 provided cleared funds available and request received before 12.00