

A large green circular graphic is positioned in the lower right quadrant of the page. The top half of the circle is a solid green color, and the bottom half is a blurred photograph of several green plant sprouts with small leaves. The text "SERVICE LEVEL AGREEMENT" is centered within the green portion of the circle.

# SERVICE LEVEL AGREEMENT

We're here to help should you have any queries.  
Call us on 0117 457 7784.

**Our role as SSAS administrator and professional trustee is to provide expertise and service to you and your professional advisers in an efficient and consistent manner.**

Our commitment to you is set out below.

## Applications

---

SSAS application acknowledgement	On receipt
New SSAS application processing	2 working days <sup>1</sup>
Takeover SSAS application processing	2 working days <sup>1</sup>
Transfer discharge forms	2 working days <sup>2</sup>

## Investments

---

Standard investment application	2 working days <sup>2</sup>
Property investment approval	5 working days
Loanback approval	5 working days
Unquoted equity approval	5 working days

## Benefits

---

Processing a BCE	5 working days <sup>2, 4</sup>
Establishing pension payroll	2 working days <sup>3</sup>
Death benefits	5 working days <sup>2, 4</sup>

## General administration

---

Regulatory correspondence	3 working days
SSAS valuations	Available 24hrs via client portal
Member fund splits	Available 24hrs via client portal
Cheque deposit	On receipt
Routine correspondence	3 working days
Professional Invoices	1 working day

## Notes

---

- 1 Subject to full money laundering documentation.
- 2 On receipt of client documentation and sufficient liquid funds.
- 3 On receipt of client documentation and sufficient liquid funds. This will be established for the member on the next available payroll date, of which there are three per month.
- 4 Subject to market valuation advice.