



The Xafinity Self Invested Personal Pension (SIPP)

Our Service Standards

If you require this document in another format for ease of reading, please let us know.



Commitment to High Standards of Service

We're committed to providing our customers with a high standard of service at all times. The standards below outline our commitment to responding to your requests in a timely manner.

New SIPP Members	
New member applications processed including Electronic Money Laundering checks performed and member bank accounts opened ^{Note 1}	24 hours
Banking	
Cheques banked	1 working day
All other banking enquiries	2 working days
Transfers in/out	
All transfer requests	4 working days
Standard Investments	
Purchase or sale of Standard Investments ^{Note 2}	2 working days
Property, Leasing and Borrowing ^{Note 4}	
Initial property information guide issued	2 working days
All Property enquiries, documentation and requests ^{Note 3}	5 working days
Member Benefits and Claims	
All enquiries relating to retirement benefits, including income withdrawal calculations ^{Note 2}	4 working days
All death claim correspondence ^{Note 3}	2 working days
General Enquiries	
All other general enquiries	5 – 10 working days
Ad hoc Valuations	
Ad hoc valuation requests	7 working days
Protection Calculations	
Protection calculations undertaken and issued	4 working days

Please note timings start at 12pm on the working date of receipt. Anything received after 12pm is counted as being received on the next working day. Please also note that our service standards are based on us receiving fully completed forms and information and do not take into account the time we spend obtaining information from third parties outside our control. We'll do our best to meet these timescales even though they're not legally binding.

- Note 1** The SIPP will be established with an operating bank account within 24hrs of receipt of a **fully completed** New Member Application form. We will also perform appropriate anti money laundering checks using our on-line system. If any of these items are not complete, further information will be required and the bank account details may not be supplied within 24hrs. We will provide the Bank Account details by email, phone or fax. The SIPP will be fully set up within 5 working days.
- Note 2** Standard Investments include OEICS, Unit Trusts, Trustee Investment Plans, Stockbroker accounts and other similar investment products. The length of time to receive proceeds from any surrender will depend on the investment providers' service levels. Xafinity cannot be held liable for time taken once surrender requests leave our office but we will monitor the progress of any surrenders at regular intervals.

- Note 3** These service levels do not cover completion of a property leasing or borrowing transaction, or settling benefit claims due to the numerous stages that must be carried out for these transactions.
- Note 4** These investment options are not available under our SimplySIPP product. If you are considering this type of investment please contact us about moving to the full Xafinity SIPP.

Contacting Xafinity

SIPP Trustee: Xafinity Pension Trustees Ltd
SIPP Administrator: Xafinity SIPP Services Ltd

SIPP DEPARTMENT
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Xafinity SIPP Services Ltd is authorised and regulated by the Financial Services Authority. Our FSA Registration Number is 461791. You can check this on the FSA's website at www.fsa.gov.uk/register. Xafinity Pension Trustees Ltd (1450089) is registered in England at 27 Kings Road, Reading RG1 3AR. Xafinity SIPP Services Ltd is registered in Scotland (No 69096) and its registered office is at Scotia House, Castle Business Park, Stirling FK9 4TZ.

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