



Hazell Carr SSAS

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.

Adding Members to a SSAS	
New member applications processed and Electronic Money Laundering checks performed ^{Note 1}	5 working days
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	
Initial property information guide issued	2 working days
All property enquiries, documentation and requests ^{Note 3}	5 working days
Loans	
Initial loan information guide issued	2 working days
All loan enquiries, documentation and requests ^{Note 4}	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** This service standard is dependent on receipt of **fully completed** SSAS member applications. We will perform appropriate anti money laundering checks using our on-line system. If any of these items are not complete, further information will be required.
- 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. Hazell Carr 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 service levels do not cover completion of the loan documentation and the loan advance instruction. Hazell Carr cannot be held liable for time taken by other parties when paperwork or instructions leave our office but we will monitor the progress of any loan at regular intervals.

Contacting HCPS

HCPS SSAS Department
Xafinity
Scotia House
Castle Business Park
Stirling
FK9 4TZ

www.xafinity.com

Tel: 01786 434250

Email: SSAS&SIPP@xafinity.com

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