



SSAS Practitioner.com
The SSAS Specialist

Lowering Fees, Enhancing Retirement

SSAS PRACTITIONER.COM SERVICE STANDARDS

SSAS Practitioner.com are dedicated to providing excellent customer service to our clients. This is demonstrated by our quick turnaround of queries and review of the accompanying paperwork to facilitate transactions.

Assuming all information and the required authorisation has been provided, we commit to process payments within 24 hours and approve investments within 48 hours. We recognise the necessity of this level of service when important deadlines are encountered to register a scheme or acquire an investment.

We act as Practitioner to the scheme and we are not a trustee so do not co-hold the scheme's assets. Clients experience the benefit of this. As we are not trustees we are not required to sign scheme paperwork, saving time. This is especially important when paperwork is circulated between parties, for example between solicitors and trustees. We do of course require sight of the documentation that our clients will sign as trustees. We will thoroughly scrutinise this to ensure that the scheme is run in a HMRC compliant manner.

We commit to complete 97% of our work to the service standards shown below.

New business	
Issue applications	1 working day
Process applications (issuing deed and bank opening paperwork)	1 working day

Banking	
Processing cheques	1 working day
Authorising bank transfers	1 working day
Recording money in	1 working day

Transfers	
Processing transfers in/out of scheme <i>* subject to a valuation of the scheme being available</i>	3 working days*



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Investments	
Review of proposed investment	2 working days
Process new investment	1 working day
Amendment to existing investment	1 working day

Benefits	
Process requests <i>*subject to a valuation of the scheme and sufficient funds being available</i>	3 working days*
Paying PCLS <i>**assuming calculation has been completed and funds are available</i>	1 working day**
Drawdown payments <i>***assuming funds are available</i>	2 working days***
NOTE: Drawdown payments can be paid throughout the month and not just on a specific day.	

Correspondence	
Urgent correspondence	3 working days
General correspondence	5 working days



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VAT Registration Number | 983834865
Data Controller Number | Z2068455
HMRC Practitioner Registration Number (ID) | 00017124

Registered with HMRC as a Trust and Company Service Provider | Reference 12587196
Full PI Insurance held
Member of AMPS (Association of Member-Directed Pension Schemes)