



JLT PREMIER PENSIONS  
SERVICE COMMITMENT



# OUR SERVICE CHARTER

---

At JLT, we understand the importance of a swift turnaround and pride ourselves on providing a first class service – accurate, quick, efficient, friendly and of course flexible.

- We task ourselves with completing at least 90% of all work within 2 working days
- Days mean working days and whilst requests received after 12pm will generally be treated as having been received at the start of the next working day, we always try our best to be flexible and appreciate that often a transaction may be time sensitive; if this is the case please be sure to let us know and we will try our utmost to accommodate.
- We encourage an open work environment where work flow processes are continuously challenged by all.
- We provide dedicated points of contact.
- If you call us, we aim to answer all calls within 10 seconds, there will be no “blind transfers” and if preferred, we will call you back at the agreed time.
- We have, well trained, friendly, knowledge and caring staff who are identifiable by name, there when you want them and who are always happy to help.
- We understand that the world of pensions can be complex and that not everyone we engage with is an expert; being appreciative of this fact, we act accordingly.
- On occasions, we may get things wrong and when we do, you can be assured that we will do all we can to put matters right. We understand that customer feedback and complaints analysis provide opportunities to make our service even better going forward. If a customer is not happy then neither are we. We want to hear about it so that we can put things right.
- All outgoing emails contain a link to a Customer Satisfaction survey - <https://www.surveygizmo.com/s3/4557984/Customer-Satisfaction-Survey>
- Achievement against standards is robustly monitored not only locally but also at group level

# TURNAROUND TIMES

---

## NEW SIPP/SSAS APPLICATIONS

2 DAY

- Initial vetting, AML checks and set-up;
  - Illustrations/feasibility reports;
  - Bank account set-up
- 

## TRANSFERS/ASSIGNMENTS

2 DAY

- Cash in or out/in-specie per stage
- 

## BANKING

1 DAY

- Cheques and payments on cleared funds
- 

## STANDARD INVESTMENTS

2 DAY

- As per our investment mandate
- 

## NON STANDARD INVESTMENTS

3 DAY

- Initial vetting and decision
- 

## PROPERTY TRANSACTIONS

2 DAY

- Purchases & Sales
  - Leases, Developments etc.
- 

## BENEFIT PAYMENTS/ADMINISTRATION

3 DAY

- All benefit commencement (capped, flexi, UFPLS etc.)
  - Annuity purchase
  - Pension payments (paid on 1<sup>st</sup> & 25 of the month)
- 

## GENERAL ENQUIRIES

2 DAY

- Ad hoc valuations, technical queries or requests for information
- 

## COMPLEX ENQUIRIES

5 DAY

**Whilst we always endeavour to meet these targets it is important to note that:**

- We are sometimes impacted by third parties or other factors outside of our control
- These do not form a part of our contractual obligations
- We accept no liability as a result of investment price fluctuations during the investment/disinvestment process

## CONTACT US

If you wish to contact us, or are interest in receiving more details about the Premier SIPP/SSAS, please contact us at:

JLT Premier Pensions

Fitzalan House

Fitzalan Court

Fitzalan Road

Cardiff, CF24 0EL

Tel: 029 2055 7000

Email: [JLTTPP@jltgroup.com](mailto:JLTTPP@jltgroup.com)

### **JLT Premier Pensions**

The St Botolph Building

138 Houndsditch

London EC3A 7AW

Tel: +44 (0)207 895 7892

[www.jltemployeebenefits.com](http://www.jltemployeebenefits.com)

JLT Premier Pensions, a trading name of JLT Benefit Solutions Limited, which is authorised and regulated by the Financial Conduct Authority. JLT is part of Mercer, a Marsh & McLennan company. Registered Office: The St Botolph Building, 138 Houndsditch, London EC3A 7AW. Registered in England No 02240496. VAT NO. 244 2517 79

Whilst all reasonable care has been taken in the preparation of this document no liability is accepted under any circumstances by Jardine Lloyd Thompson for any loss or damage occurring as a result of reliance on any statement, opinion, or any error or omission contained herein. Any statement or opinion unless otherwise stated should not be construed as independent research and reflects our understanding of current or proposed legislation and regulation which may change without notice. The content of this document should not be regarded as specific advice in relation to the matters addressed.