

Service Standards

As part of our commitment to maximise service levels, we maintain a schedule of service level standards, and monitor our performance against these standards.

In setting our service levels, our aim is to set times for processing work which are among the best in our industry and ensure that a high level of care is taken in all the work we carry out.



Our service level standards (in working days) for the main items of work are set out below. The number of working days quoted is the maximum and may be improved on. Details of service levels for other areas of work can be supplied on request.

Curtis Banks Service Level Standards

Notes

New Business

Issuing a SIPP application pack	same day	
Acknowledging receipt of a new SIPP	same day	
Processing a new application	2 days	1

Transfers

Processing transfer forms	2 days	1
Paying cash transfer-out	same day	1,2

Banking

Paying in cheques and transfers	same day	
Paying out cheques and transfers	same day	1,2

Quoted Investments

Processing purchase/sale forms	same day	1
Issuing payment for purchase	same day	1,2

Property Investment

Agreeing purchase in principle	2 days	1
Agreeing suitability of property valuation	2 days	1
Agreeing suitability of borrowing	2 days	1
Confirming instructions to solicitors and lenders	3 days	1
Completing legal documentation	2 days	1
Dealing with technical queries	4 days	
Transferring funds for purchase	same day	1,2

Retirement

Acknowledging request	same day	
Processing and paying lump sum	5 days	1
Processing of pension payroll	before next monthly pay date	

General Administration

Requests for information	same day	
General enquiries	5 days	

Notes

1 Provided correct documentation/information received

2 Provided cleared funds available and request received before 12pm