

# Rowanmoor Pension SSAS processing timescales

All days are working days, following receipt of all required information and appropriate authorisation. We aim to complete no less than 95% of our work within these timescales. Due to the highly consultative nature of our SSAS administration, and other factors, including the involvement of third parties, there may be occasions when it is not possible.

## New Business

<b>Issuing application packs</b>	1 day
<b>Acknowledging receipt of new applications</b>	1 day
<b>Processing applications</b> Includes issuing new scheme documentation and establishment of the scheme bank account(s).	3 days

## Banking

<b>Processing cheques</b>	1 day
<b>Money received</b>	1 day
<b>Payments out</b> Dependent upon the availability of cleared funds.	1 day

## Transfer of existing benefits

<b>Transfer in or out</b> Transfer, in particular in specie transfers, are complex and involve liaison with third parties. This is the timescale we aim to meet to process forms and respond to requests, during each part of the transfer process.	10 days
--	---------

## Investments

<b>Investment feasibility investigation</b> Reviewing requests for investment in new assets of a complex nature, not already approved by us, and providing feedback.	5 days
<b>Processing new investments</b> Dealing with each stage of an approved investment.	3 days
<b>Processing existing investments</b> Dealing with each stage of any changes to an existing investment, such as a sale or partial disinvestment.	3 days

## Benefits

<b>Processing requests</b> Reviewing requirements and processing requests for calculations.	10 days
<b>Retirement illustrations</b> Provision of retirement illustration for benefits a member may take from the SSAS.	10 days
<b>Paying pension commencement lump sums</b> Processing and payment from available funds.	5 days
<b>Pension payments</b> Establishing pension payroll records and making payment. Our payroll is run on the last working day of the month.	5 days

## General

<b>Priority correspondence</b> Responding to priority enquiries received by post, fax, email or telephone that do not fall into the above categories.	3 days
<b>General correspondence</b> Responding to general enquiries received by post, fax, email or telephone that do fall into the above categories.	10 days

For more information on Rowanmoor's products and services please visit our website [www.rowanmoor.co.uk](http://www.rowanmoor.co.uk), call 03445 440 550 or email [enquiries@rowanmoor.co.uk](mailto:enquiries@rowanmoor.co.uk).



Rowanmoor is a trading name of Rowanmoor Executive Pensions Limited registered number 05792242, Rowanmoor Personal Pensions Limited registered number 02268900 and Rowanmoor Trustees Limited registered number 01846413. All of these are registered in England at Rowanmoor House, 46-50 Castle Street, Salisbury, SP1 3TS and are wholly owned subsidiaries of Embark Group Limited. Rowanmoor Personal Pensions Limited is authorised and regulated by the Financial Conduct Authority (FCA) under reference number 458260. The provision of Small Self-Administered Schemes (SSAS) and trustee and/or administration for SSAS are not regulated by the FCA. Therefore, Rowanmoor Executive Pensions Limited and Rowanmoor Trustees Limited are not regulated by the FCA in relation to these schemes or services. DB SSAS PT 05/19