

Selectapension Bureau Services Ltd (SBS)

Typical Advised Case Timeline

Feedback from introducing financial advisers has suggested that there is some confusion and misunderstanding of the potential timescales for the completion of transfers from occupational pension arrangements.

The following document is to be used as a guide for the timescales of the various stages involved in the transfer, which can take up to 33 weeks to complete.

Please note:

- The timescales quoted are indicative only
- The timescales quoted are average times based on the experience of SBS
- SBS endeavour to follow up requests for information every 2 -3 weeks where appropriate
- Many of the areas quoted are beyond the control of SBS, particularly where SBS are requesting information from a third party

