

Service Standards – Consumer Guide

We have identified the following service standards as a means to measure our performance:

1	We will respond to telephone calls and all correspondence received from existing clients within 24 hours .
2	We will respond to telephone calls and all correspondence from customers we have previously completed work for within 5 working days .
3	<p>We will aim to complete all work within reasonable timescales as follows:</p> <hr style="border-top: 1px dashed #ccc;"/> <p>From ‘Day 1 Submission’ of your Authority to Proceed, to providing our advice – 8 weeks maximum.</p> <hr style="border-top: 1px dashed #ccc;"/> <p>From when you agree to our recommendations, to implementation of all actions detailed in our Report – 4 weeks maximum.</p>

In setting these targets, we must stress that we are reliant on the timely and efficient response to our requests for information from both clients, and any 3rd party organisations involved in the financial planning process.

Further:

- We will **provide regular and timely updates** as our work progresses.
- We will **provide a report detailing our advice** and recommendations as follows:

For pensions and investment work, the report will generally be issued **before any transactions are undertaken**.

For mortgage related work, you will receive the report **within 10 days of an application** being submitted to a lender.

For protection related work, the report will generally be issued **before cover commences** and if this is not possible, then **always before a statutory cancellation period ends**.

- In the event of us being unable to achieve these service standards, we will provide an explanation and an indication of revised, likely completion dates.
- In the event of you ever having cause to complain, we follow a robust, clearly documented Complaints Process managed by The Complaints Department, Intrinsic Financial Planning Ltd (see our Terms of Business).

In order to maintain & develop our services we welcome feedback, using positive comments to reinforce the good things we do, whilst negative views are used to consider changes and any improvements we can make.