

Arbuthnot Latham Pensions Administration

This Q&A seeks to answer some of the more common questions that arise based upon our previous experiences of this sort of business transfer. A copy can be viewed on the website of Premier Pension Services – www.premierpensionservices.co.uk.

We will be updating this document to reflect questions raised by members and their advisers as the weeks go by.

We have established a dedicated team to manage the Arbuthnot Latham portfolio of SSAS, SIPP and FURBS and their contact details are shown below.

Client Questions & Answers

Q. What has happened to my SIPP?

A. Premier Pension Services, a division of JLT Benefit Solutions Ltd, is taking over the day to day administration of your SIPP whilst we will continue to work closely with Arbuthnot Latham who will remain involved in their specialist area as bankers and cash managers to member policies.

Q. What does this mean for me in practice?

A. Premier Pension Services is a highly experienced pension administration provider and our objective is to ensure that service levels are at least maintained if not improved - so our intention is that you will experience the minimum of change. To assist us in this, some of the Arbuthnot staff will be working with us over the next few weeks to ensure clients experience no disruption to service standards and current work.

Q. Where will my policy or scheme be administered?

A. The administration of the portfolio has been moved to our centre of excellence in Cardiff where schemes of this type are dealt with.

All correspondence should now be addressed to:

Arbuthnot Service Team
Premier Pension Services
Fitzalan House
Fitzalan Court
Fitzalan Road
Cardiff
CF24 0EL

Q. What has happened to any current work being undertaken by Arbuthnot Latham?

A. Over the last few weeks Premier Pension Services has been working with Arbuthnot Latham to plan for a successful transfer of the administration functions, which includes managing current work. The existing post has been transferred to Premier Pension Services in Cardiff who will now be dealing with this.

Q. Who can I contact to discuss the administration of my SIPP?

A. Full contact details will be maintained on the website. Senior Arbuthnot team contacts are:

- Emma Jurkojc, 029 2055 7031, emma_jurkojc@jltgroup.com
- Alison Hosgood, 029 2055 7027, alison_hosgood@jltgroup.com
- Suzanne Bodilly, 029 2055 7040, suzanne_bodilly@jltgroup.com
- Rebecca Thomas, 029 2055 7022, rebecca_thomas@jltgroup.com

Q. Have any of my SIPP assets been affected?

A. No - all your SIPP assets remain invested as before and continue to be owned jointly between the Trustee Company and you the member.

Q. What has happened to the SIPP Bank Account?

A. Nothing - your existing bank account arrangements will remain in place.

Q. What has happened to my SIPP property?

A. If you have a property held in your SIPP then your investment remains unaffected by the change. Your existing property management and insurance arrangements are unaffected albeit we would be pleased to discuss with you in the future our 'block' facilities that might offer you some savings in costs.

Q. Will my retirement income be affected?

A. The uninterrupted payment of pensions is a priority for us, and whilst we will try to ensure that the timing and amount of payment will remain unaffected by the business transfer, your first month's payment may be made by a different method than you are used to. We will of course, aim to return to "business as usual" as soon as possible.

Q. Will my policy number change?

A. No - there will be no change to the policy reference number and any correspondence should continue to quote the policy number and member name.

Q. Will there be a change in the administration fees?

A. No – existing fees will be maintained. We will re-issue the Arbuthnot Latham Terms and Conditions as Premier Pension Services in the next month or so but our intention is to offer the same level of service with no fee changes other than those that normally apply i.e. adjustment by NAE.

Nigel Manley
Head of Self Invested Pensions
Premier Pension Services