

Pension Transfers PTL®
Service Quality Model
Adding value to our UK clients

Listen
We note your requirements online or by telephone

- Choose the exchange rate
- New mortgage
- Advice on risk profile
- UK Based clients receive compliant report
- Intro to KiwiSaver
- Estate Planning
- Risk Advice

Easy Process
You go online to www.PensionTransfers.co.nz
Complete fact finder form.
Print and sign letter of authority.
Fax or post to our office.
We confirm receipt of your details & request the value of your pension transfer from your current provider.

Match
We match our approach with your requirements

Submit Proposal and Open Cash Account
We send pension transfer proposal to you for AXA to open your cash account

- Agree on Terms for sign off**
- Transfer value in sterling
 - Our service fees
 - Next-step process

Client handover to Spicers

Added Value
We present 7-Step Process to you

