Pension Transfers
UK Transfer Specialists

Service Quality Model
Business Process
www.pensiontransfers.co.nz
Adding value to our UK clients

Client receives 6 monthly/annual email notification to start review process.

Client receives six monthly/annual AXA statement(s) with current account balances, returns and general investment update.

Client email gives personal link to Morningstar Investment Questionnaire. Clients are requested to complete the questionnaire and submit back to Pension Transfers Ltd.

Once email has been submitted client receives confirmation of Morningstar investment results from Pension Transfers Ltd. Notification is sent to Pension Transfers Ltd confirming this has been completed.

Pension Transfers Ltd check Morningstar investment results against current investment set up. If change is recommended, Pension Transfers Ltd send a switch form with recommendation for client to complete and send directly to AXA to avoid any time delays.

Confirmation of any switch will be sent by AXA outlining the new portfolio structure.

Monthly returns will be sent to all clients who have registered an email address with Pension Transfers Ltd.

Pension Transfers Ltd keep track of individual's monthly account balances and provide tracking performance data over the last 6 to 12 months if required.

Retirement calculators are available on the website www.pensiontransfers.co.nz 24 hours a day 7 days a week. Results can also be emailed to individuals.

We are contactable by phone and email 5 days a week to answer any questions you might have.