

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

Listen
 We listen to your requirements

- Choose the exchange rate
- New mortgage
- Advice on risk profile
- Intro to KiwiSaver
- Intro to other services

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
 We send pension transfer proposal to you

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

Added Value
 We present full financial report to you

- Added Value Report**
- Retirement projections
 - Asset allocations
 - Risk management
 - Estate planning
 - KiwiSaver

Continual Improvement
 You complete our 5-point "Customer Satisfaction" questionnaire for our policy of continual customer service improvement

After Sale Service
 We keep in touch to ensure satisfaction

- Stay Informed**
 We keep in touch with timely e-mailed reporting.
 Review Report
 Referral programme

Pension Transfers Limited

www.PensionTransfers.co.nz

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