

A Step by Step Summary of Our Report Process

Fee Estimate

- Request a fee estimate.
- Email feeestimates@southdownconsultants.co.uk or
- Complete the request form on our website.

Letter of Instruction

- Send to us your letter of instruction along with information on all pensions that are to be assessed and included within the report.
- An example letter of instruction is on our website if required.

Initial Assessment

- We will carry out an initial assessment, confirm the report fee and let you know what, if any, additional information we will need before we can schedule to prepare the report.

Data Gathering

- You can gather additional information or we can do this, with the appropriate authority. Once we have everything we need, we will schedule the report to be prepared.
- Our typical timescale to prepare and issue a report is 5 - 6 weeks.

Outcomes Prepared

- Outcomes are prepared by our analysts and PODEs.
- All outcomes are peer reviewed by at least one PODE before being approved.

Report

- Our reports are prepared by our administrators and again peer reviewed and checked by one of our PODEs before final approval and issuing.