



Dear third-party information provider,

We've identified some key points and common themes that we'd like to work on together for the benefit of our mutual customers.

Priority customer claims

We're currently looking at our customer care processes and taking some steps to make further improvements. In the coming weeks we'll be making firms aware of customer prioritisation needs. Firms will be notified within the **email subject line** to make it easier to identify the priority status of a request.

We will be asking that where a priority customer is raised, that this is expedited as quickly as possible and returned to us within **5 working days**. If you can't meet this timescale, we ask that you notify us as soon as possible and provide an expected timescale, so we can manage customer expectations and avoid chasing you unnecessarily.

External firms you may need to contact

We often request information that you may need to obtain from external firms such as fund managers. If you need to contact an external firm, we ask that you send our claims team an email **confirming the name of the firm/fund manager** you've contacted and the **date of contact**.

We're aware that you may experience delayed responses from these external firms, leading to delays in your response times to FSCS. Where this occurs, please let us know as soon as possible so we can manage customers' expectations and so we don't chase you needlessly. Please also let us know if you've exhausted your chase cycle with the external firm and haven't been able to obtain the information we need.

Notional Transfer Values

We recently issued a newsletter highlighting the positive impact of your provision of notional transfer values. You can find our newsletter on our [3rd party newsletter page](#).

We've identified that when some firms send us notional transfer values they don't always confirm that it is a notional transfer value. We ask that you **explicitly state** you've provided us with a '**notional transfer value**' and refrain from abbreviations such as 'transfer value' – which can mean something different. This will ensure we don't contact you again for clarifications.

It's also important that you **date the notional transfer value correctly**, include correct details of the pension plan, associated fees, transfers, and penalty details if applicable.

Reminder – response times

As you know, FSCS expects requests to be actioned and returned in a timely manner and within the deadlines set – often within **14 days**.

We're aware that sometimes it's not possible to get back to us within the deadline set, in which case please let us know why and when you expect to send us the outstanding information. Please also let us know if you haven't been able to send us everything we've asked for and why not.

We hope you've found this newsletter useful. We also encourage you to [contact us](#) if you've identified any areas for improvement or discussion.

Yours sincerely

The Relationship Management Team

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