



HARTLEY PORTAL

The **digital SIPP** that  
will revolutionise the  
pension industry

Tomorrows  
pension provider  
has arrived





## Hartley Pensions have designed a portal to suit client needs in the modern world of retirement.

The Hartley Portals provide you and your clients with a fully online experience. You access via a modern, functional portal that's completely responsive for desktop, tablet and mobile.

The Portal also provides functionality that can't be rivalled by competitors. It allows IFAs and clients to set up, administer and take benefits from their SIPP's all in one place.

Hartley Pensions has achieved full automation on all common pension administration requests, and the portal has the following features as standard:

- ✓ Ability to manage SIPP and investor details online;
- ✓ View investment summary;
- ✓ Full lifecycle of SIPP digitalised;
- ✓ View bank transactions;
- ✓ Secure Messaging for reliable, secure communications;
- ✓ Full automation of the drawdown process.

IFA's will have full view of all of their clients accounts.

The ability to access and view their clients details is driven by the Portal login process and linked to their user profile, which no one else can access.

Paraplanners will have access to their IFA's clients and at a company level and will also be able to view all of their clients.

We have developed **Market leading** functionality within our Portal that includes:

- ✓ Separate IFA and client portals;
- ✓ Create new applications without wet signatures;
- ✓ Application process can include transfers, contribution set-up and taking benefits.

Once a client is setup:

- ✓ Ability to **take** benefits  
Initiate **further** transfers in  
Make **new** or amend contributions;
- ✓ View SIPP bank account transactions  
View current and historic fund values  
View investment breakdown  
View crystallised and uncrystallised spilt;
- ✓ Send secure encrypted messaging built in to contact your own experienced pension administrator;
- ✓ Ability to View all documents  
Change beneficiaries  
View fee schedule;
- ✓ **You choose** how much access your client has with View only or full options available in clients portal.



# HARTLEY PORTAL

A market leading Portal

**We believe** we have developed a market leading Portal, we have compared the functionality of our Portal against five of our peer competitors and below is how we stack up against them.

		Number of Competitors Portals	
Process	Hartley portal	Same functionality as Hartley	Does not have the level of functionality as Hartley's
<b>Is the portal available to IFAs and their clients?</b>	Yes	2	3
Available to non-advised/execution only clients?	Yes	3	2
<b>Can I submit a brand new SIPP application, and how long will it take for my SIPP to be set up afterwards?</b>	Yes. The SIPP will immediately be opened upon submission of a completed online application. A welcome pack will automatically be saved in yours and if applicable, your clients document vaults	4	1
Do I need to provide ID to verify my identity?	Electronic AML checks are carried out and ID is only needed if electronic check fails	4	1
<b>Can I produce illustrations through the portal?</b>	Yes	4	1

Process	Hartley portal	Same functionality as Hartley	Does not have the level of functionality as Hartley's
<b>Can I request the transfer in of my existing pensions through the portal?</b>	Yes	3	2
Can I set up regular personal contributions?	IFA – Requests can be fully submitted via the IFA portal and a DDM for the client to sign electronically will be sent to the client's document valuat.	2	3
<b>Can I set up regular employer contributions?</b>	Yes. A pre-populated employer schedule and DDM will be provided for the employer once a contribution workflow has been completed. Scanned copies of these forms can be returned to Hartley via portal/ secure messaging once signed by employer	1	4
Can I submit a request to pay in a one-off/single contribution (personal and employer)?	Yes, all contribution types can be submitted via the portal	1	4
<b>Can I submit a request to take tax free cash for the first time?</b>	Yes	2	3
If I have already taken some of my tax free cash, can I submit a request to take some or all of my remaining tax free cash entitlement?	Yes	2	3

Process	Hartley portal	Same functionality as Hartley	Does not have the level of functionality as Hartley's
Can I submit a request to take a taxable income from my crystallised funds?	Yes	3	2
Can I view a current valuation of my SIPP?	Yes, the most recent values of investment can be viewed on the portal	5	0
Can I view a current split of my uncrystallised and crystallised funds?	Yes, a fund split will be based on the latest valuations received.	2	3
Can I access the portal from my tablet or phone?	Yes	5	0

## Due Diligence

The security of your clients information is very important to Hartley Pensions. The Hartley Portal is a safe and secure place for you to manage your clients SIPPs and meets ISO 27001 (which is an international standard that is recognised globally for managing risks to the security of information. This standard specifies the requirements for an information security management system (ISMS)).

## Future proof SIPP solution

Designed to suit **all client needs** in the modern world of retirement, we believe that the Hartley Portal provides you with **all the choice** and functionality required from a SIPP both pre and post retirement. We believe we have developed a cutting edge portal which will allow you to service your clients more efficiently and provide an access to online resources not currently available with other providers.

- ✓ The ability to add ISA and GIA accounts with investment choices;
- ✓ Real time straight through processing on every process meaning instant responses and work completed.

## Next steps

If you are interested in viewing the portal please contact us at [portal@hartleypensions.com](mailto:portal@hartleypensions.com). We will be very pleased to setup a demonstration to suit you.



## Why Hartley Pensions

Hartley Pensions is **dedicated** to providing superior services to our business partners and clients. We remain **committed** to providing a professional efficient service while administering our clients' pensions by providing individual, customised attention throughout our **lifelong partnership**.

- ✓ Treat each client as an individual;
- ✓ Maintain a high standard of customer service;
- ✓ Work as a team to provide services efficiently and in a professional manner;
- ✓ Creative and innovative use of technology to respond to ever changing needs of our clients and changes in legislation;
- ✓ Maintain a high level of excellence through frequent and varied employee training;
- ✓ Demonstrate compassion to clients and their beneficiaries;
- ✓ Communicate changes and improvements in Pension related areas to our business partners frequently in a clear, understandable manner.

In 1981, the company established itself as a SSAS provider and in 2001 opened its first SIPP. We now, in addition, offer ISAs, QNUPS, QROPS and Life Assurance. Hartley provide white label SIPP's for a number of leading investment and trading platforms.

We pride ourselves on establishing and maintaining **long-lasting** relationships with our business partners and clients by providing them with professional, friendly and personalised administration. Our products are designed to be flexible, straight-forward and relevant to our **clients needs**.

Upon joining the Wilton Group in 2015, we expanded the range of products and services available to our clients and are thus delighted to be in a position to provide innovative and flexible **wealth management solutions**.



Hartley Pensions Limited is registered in England & Wales (09469576). Hartley Pensions Limited is authorised and regulated by the Financial Conduct Authority. FCA Number 735936 and is a subsidiary of the Wilton Group.

