

Adapting to changes in an uncertain world



The Story

Our existing plan holders Mr & Mrs Hanson* approached us in regard to accessing a cash release on their plan. Unfortunately what should have been a simple transaction was complicated by the effects of the global pandemic. With Mrs Hanson having gone out to Italy during the process, the country entered lockdown leaving her stranded and unable to return home. With access to the funds being time-critical, they were keen for the process to go ahead as normally as possible rather than waiting for her to return to the UK (whenever that may have been).

What We Did

Rather than simply accept defeat on the matter, our dedicated Customer Account Servicing team leaned on their can-do attitude and experience to try and find a workable solution. With the help of colleagues in the Compliance team, they were able to get all documents to both clients and duly signed.

The Result

The great work by our team meant that the drawdown case was able to progress in a timely manner, irrespective of the challenges of the wider landscape.

The case is a prime example of the customer-focused culture and robust, adaptable mindset of our Customer Account Servicing team, meaning that long after completion your clients will continue to receive market-leading follow-on care throughout their time with us.

“The great thing about the team, and the business as a whole, is that we’ve all got a common goal of giving our customers the best possible experience. It makes working together to solve unusual cases so much easier.”

Bethany, Junior Property Administration Manager

*Client names have been changed to provide anonymity.

We cannot give any assurances that applications outside our lending criteria will be approved.

