

Preferred Investment Partners

Curtis Banks are unable to provide advice on which FCA regulated arrangements you should use for your investments and you are free to use arrangements of your choosing, subject to us completing our own due diligence requirements and the business involved signing up to our Investment Manager Agreement.

Whilst you can choose your own arrangements, we have created a panel of firms who are able to operate effectively in partnership with us, including a commitment to provide all required data automatically to our systems. You can access panel firm asset valuations instantly via our website.

The firms selected for inclusion in the panel will be reviewed regularly and may be subject to further due diligence if the investment strategy deviates from our permitted standard asset list. In this instance the full SIPP annual fee may apply.

Panel of Preferred Investment Partners

A	
Alpha Portfolio Management Ltd	Andrews Gwynne LLP
Albert E Sharp	Arbuthnot Latham and Co Ltd
Alliance Trust Savings	Ascentric
Amber Financial Investments Ltd	AXA Wealth Ltd
B	
Balkerne Asset Management	Bowmore Asset Management Ltd
Barclays Wealth	Brewin Dolphin Ltd
Bordier and Cie UK Plc	Brooks Macdonald Asset Management Ltd
BoulterBowen WealthCare	
C	
C Hoare and Co	City Asset Management Plc
Canaccord Genuity Wealth Ltd	Close Brothers Asset Management
Cardale Asset Management Ltd	Cofunds Ltd
Casterbridge Wealth Ltd	Connor Broadley Ltd
Cazenove Capital Management	Credo Capital Plc
Charles Stanley and Co Ltd	
D	
Duncan Lawrie Private Banking	
E	
EFG Harris Allday	EQ Investors
Elevate Portfolio Services	European Investment Management Ltd

F

Fidelity Investment Services Ltd / Fidelity FundsNetwork Fusion Wealth Ltd

G

Gore Brown Investment Management Ltd

H

Hargreave Hale Ltd HFM Columbus

Hawksmoor Investment Management Ltd Holden and Partners LLP

Heartwood Wealth Management Ltd

I

IFPC Ltd IPS Capital LLP

Investec Wealth and Investment Ltd

J

J M Finn and Co Ltd James Hambro and Partners LLP

James Brearley and Sons Ltd

L

Leodis Wealth Ltd

M

Mattioli Woods Plc Mountstone Partners Ltd

McInroy and Wood Ltd Myddleton Croft Ltd

N

Novia Financial Plc

O

Octopus Investments Ltd OCM Wealth Management Ltd

Odey Wealth Management (UK) Ltd Old Mutual Wealth Ltd

P

Parmenion Capital Partners LLP Progeny Asset Management Ltd

Praemium Ltd Psigma Investment Management

Q

Quartet Capital Partners LLP Quilter Cheviot Ltd

R

Rathbones Investment Management Ltd Redmayne-Bentley LLP

Raymond James Investment Services Ltd Rowan Dartington and Co Ltd

RC Brown Investment Management Ruffer LLP

S

Saltus Partners LLP	St. James's Place Retirement Plan
Sanlam Private Investments (UK) Ltd	Standard Life Savings Ltd
Selftrade	Standard Life Wealth Ltd
Seven Investment Management LLP	Stocktrade
SG Hambros Bank and Trust Ltd	Succession Advisory Services Ltd
Smith and Williamson Investment Services Ltd	

T

TAM Asset Management Ltd	Tilney Investment Management Ltd
The Share Centre Ltd	Towry Investment Management Ltd
Thesis Asset Management Plc	Transact
Thomas Miller Wealth Management Ltd	True Potential Investments LLP
Thurleigh Investment Managers LLP	Turcan Connell Asset Management Ltd
Tilney Bestinvest	

V

Veritas Investment Management LLP	Vestra Wealth
VWM Consulting Ltd	

W

W H Ireland Ltd	Waverton Investment Management Ltd
Walker Cambria	Whitechurch Securities Ltd
Walker Crips Stockbrokers Ltd	

Curtis Banks Ltd
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