

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	Arbuthnot Latham and Co Ltd
Amber Financial Investments Ltd	Ascentric
Andrews Gwynne LLP	AXA Wealth Ltd

B

Barclays Stockbrokers Ltd	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	Charles Stanley and Co Ltd
Canaccord Genuity Wealth Ltd	City Asset Management Plc
Cardale Asset Management Ltd	Close Brothers Asset Management
Casterbridge Wealth Ltd	Cofunds Ltd
Cazenove Capital Management	Credo Capital Plc

D

Duncan Lawrie Private Banking

E

EFG Harris Allday	European Investment Management Ltd
EQ Investors	

F

Fidelity Investment Services Ltd	Fusion Wealth Ltd
----------------------------------	-------------------

H

Hargreave Hale Ltd	Heartwood Wealth Management Ltd
Hawksmoor Investment Management Ltd	HFM Columbus

I

IFPC Ltd	Ingenious Asset Management Ltd
Investec Wealth and Investment Ltd	IPS Capital LLP

J

J M Finn and Co Ltd	James Hambro and Partners LLP
James Brearley and Sons Ltd	

L

Leodis Wealth Ltd

M

McInroy and Wood Ltd	Myddleton Croft Ltd
Mountstone Partners 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	Psigma Investment Management
Praemium Ltd	

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 Wealth Management Plc
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

Thesis Asset Management Plc

Towry Investment Management Ltd

Thomas Miller Wealth Management Ltd

Transact

Thurleigh Investment Managers LLP

True Potential Investments LLP

Tilney Bestinvest

Turcan Connell Asset Management Ltd

V

Veritas Investment Management LLP

Vestra Wealth

VWM Consulting Ltd

W

W H Ireland Ltd

Waverton Investment Management Ltd

Walker Crips Stockbrokers Ltd

Whitechurch Securities Ltd

Curtis Banks Ltd

February 2017