

PREFERRED INVESTMENT PARTNERS



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 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 Ltd
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

JM Finn and Co Ltd	
--------------------	--

L

Leodis Wealth	
---------------	--

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	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 Limited T 0117 910 7910
3 Temple Quay F 0117 929 2514
Bristol
BS1 6DZ curtisbanks.co.uk

This document shall be governed by and construed in accordance with the laws of England & Wales. It is based on our current understanding of regulations and can be subject to change as tax laws and legislation may change over time. Call charges will vary. We may monitor and record calls.

If you're contacting us by email, please remember not to send any personal, financial or banking information because email is not a secure method of communication. Curtis Banks Ltd is the operator and administrator of the SIPP. Colston Trustees Limited is trustee of the SIPP

Curtis Banks Limited (registered number 6758825) and Colston Trustees Limited (registered number 6867955) are companies registered in England & Wales with their registered address at 3 Temple Quay, Bristol, BS1 6DZ. Curtis Banks Limited is authorised and regulated by the Financial Conduct Authority. INVPAN 0917

