

15 July 2016

Curtis Banks Group plc
(“Curtis Banks” or the “Group”)
Acquisition of 5,000 SIPPs

Curtis Banks Group plc, one of the UK’s leading SIPP providers with a portfolio of approximately 68,000 SIPP, is pleased to announce the acquisition, for an undisclosed sum, of the Self Invested Pension Plans (“SIPP”) business of European Pensions Management Limited (“EPM”) from the Special Administrators to that company.

EPM administers circa 5,000 SIPP with assets under administration of circa £630m. The business will be administered by Suffolk Life Pensions Ltd, a wholly owned subsidiary of Curtis Banks, with offices and staff retained at EPM’s offices near Salisbury. The acquisition continues Curtis Banks’ stated strategy of growing both organically and by acquisition.

Commenting on the acquisition, Rupert Curtis, Chief Executive at Curtis Banks, said:

“This is an acquisition of a significant book of SIPP that further enhances our position as the largest SIPP operating group providing bespoke purely administration services. We look forward to welcoming the EPM clients to the Curtis Banks Group and working with their professional advisers.”

Will Self, Managing Director of Suffolk Life, added:

“This acquisition, coming shortly after Suffolk Life joined the Curtis Banks Group, delivers a statement of the Group’s commitment to grow our position in the independent SIPP market, and demonstrates our capability to support advisers and investors in sections of the market that many other SIPP operators have retreated from.”

The joint Special Administrators to European Pensions Management Limited were Adam Stephens, Finbarr O’Connell, Henry Shinnars and Greg Palfrey from the Restructuring and Recovery team at Smith & Williamson; they were appointed on 21 June 2016.

For more information:

Curtis Banks Group plc

Rupert Curtis – Chief Executive Officer

Paul Tarran – Chief Financial Officer

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Via Walbrook PR

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Notes to Editors on Curtis Banks:

Curtis Banks administers Self-Invested Pension products, principally SIPP and SSASs. The Group commenced trading in 2009 and has successfully developed, through a combination of organic growth and acquisitions, into one of the largest UK providers of these products. The Group employs approximately 500 staff in its head office in Bristol and regional offices in Ipswich, Dundee and Market Harborough.

For more information – www.curtisbanks.co.uk

Note to Editors on Smith & Williamson:

Smith & Williamson is an independently owned professional and financial services group with over 1,600 people. The group is a leading provider of accountancy, financial advisory and investment management services to private clients, professional practices and mid-to-large corporates. The group has thirteen offices; these are in London, Belfast, Birmingham, Bristol, Cheltenham, Dublin (City and Sandyford), Glasgow, Guildford, Jersey, Manchester, Salisbury and Southampton.

www.smith.williamson.co.uk

Smith & Williamson LLP

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