

CURTIS BANKS GROUP

Due Diligence (for advisers)

You may also wish to review the documents below to assist your due diligence:

[AKG Financial Report](#)

[The Lang Cat: Pricing Analysis](#)

Your future, our focus.

[curtisbanks.co.uk](https://www.curtisbanks.co.uk)

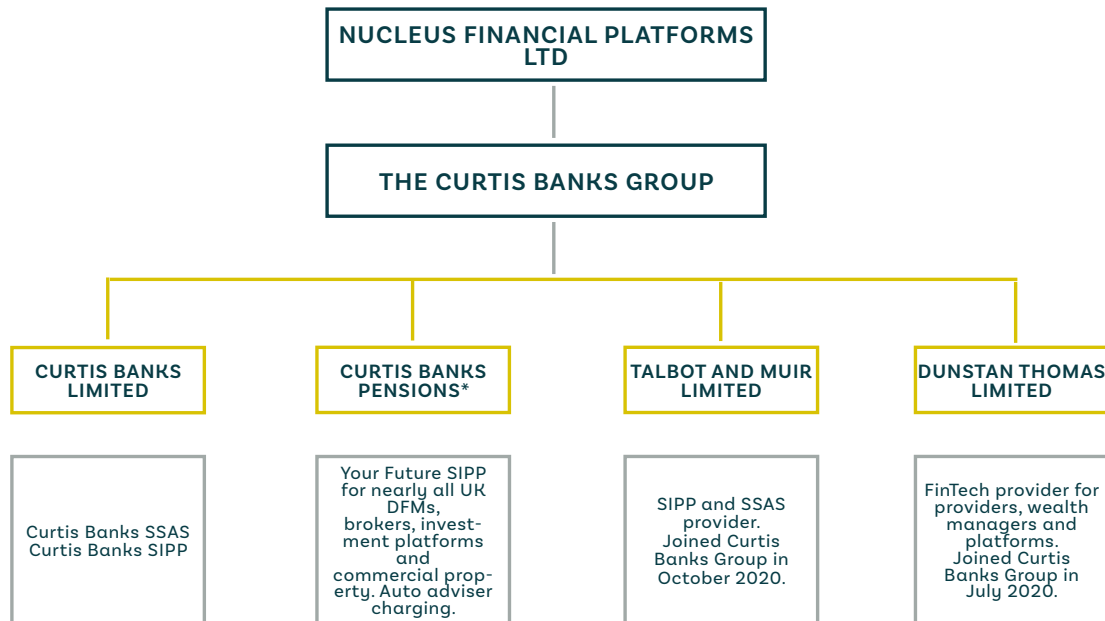


Contents

Section	Page
Curtis Banks Group overview	3
Why choose Curtis Banks	4 - 5

CURTIS BANKS GROUP OVERVIEW

Curtis Banks Group comprises a number of businesses and is evolving from a solely focussed SIPP administrator to a more holistic retirement group which provides technology and complementary services for the advised retirement market, including FinTech, legal and property services.



*Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited.

Curtis Banks Group was founded in 2009, and has grown strongly through both organic new business and acquisitions.

As at 31 Dec 2022, the key metrics of the business were:

- 78,500** SIPPs under administration
- 3,602** Growth in new SIPPs in 2022
- £35.8bn** Assets under administration

New business is predominantly accepted via UK-authorized financial advisers.

Curtis Banks Group employs approximately 800 staff across head office and regional sites.

AKG RATING

Curtis Banks has a Financial Strength Assessment of B (Strong) from AKG, as well as a 4 star rating for Service, Image & Strategy and Business Performance.



WHY CHOOSE CURTIS BANKS

Curtis Banks specialises in self-invested pensions. The senior team has been involved with SIPP's and SSAS's since 1995 giving us almost unrivalled experience in this field.

Since 2009 the Group has grown through a combination of acquisitions and organic growth, and has maintained a focus on robust service, modern technology and innovation throughout.

At Curtis Banks we believe that our charges are fair and transparent, and represent good value for money in return for extensive administrative experience which is the sole focus of our business. Curtis Banks neither offer advice nor run any of our own investment funds leaving us able to concentrate fully on meeting the needs of clients and advisers alike.

The charges associated with setting up and administering SIPP's are not related to fund size and are generally flat fees that are easy to understand. With the menu based approach a client will only pay for what they use making it incredibly flexible and cost effective.

curtisbanks.co.uk

Portal access comes as standard with all our pensions. Our online portal is completely responsive to any device to access on the go, with Secure Messaging for reliable, secure communications accessed via our website.



WHY CHOOSE CURTIS BANKS (CONTINUED)

At Curtis Banks we pride ourselves on the breadth and depth of experience within the company and the dedication of our people in delivering the best service for our clients.

Commercial property experts

We are organised in to specialist teams including a dedicated team of property professionals who manage in excess of 8,800 properties on behalf of thousands more clients, making us one of the largest commercial property landlords in Europe.

Curtis Banks recognises the importance of strong ethical values in order to meet our responsibilities to our stakeholders. These stakeholders include our customers, our employees, our investors, our suppliers, the community, and the environment.

Corporate social responsibility (CSR) is a core strength for our business, often driven by the many inspirational efforts of our staff. We bring together the great initiatives and activities undertaken in each location, while still encouraging making a genuine difference in local communities.

We have a broad focus on all CSR matters such as environmental, fundraising, community, social awareness and individual support.



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Call charges will vary. We may record and monitor calls.

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