

YOUR FUTURE SIPP

Full list of Investment Partners and firms

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Your future, our focus.

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



Full list of Investment Partners and firms

Please find below a list of investment firms that you can select for Your Future SIPP.

Whilst you can choose any investment firm listed below, we have created a panel of Investment Partners that provide an integrated option by reporting data to us electronically, allowing us to pass on fee savings to you. These electronic data feeds provide automatic, daily updates to our systems, which you can access through our secure portal via our website www.curtisbanks.co.uk.

If Curtis Banks are required to place any transactions directly with an investment partner (for example a purchase, sale or switch), we will charge transaction fees as if they were directly held investments. Please see the Your Future SIPP Schedule of Fees for further information on these fees.

In addition to those listed, we would be happy to deal with any investment firm that meets our due diligence requirements. In the instance that an investment firm does not meet our requirements to become an Investment Partner, additional fees will be applicable and you should refer to the Schedule of Fees for your product.

You are responsible for deciding which FCA-regulated investment firm you should use for your investments as Curtis Banks are unable to provide advice. The panel of investment firms is reviewed regularly and if any investment firms fail to meet our ongoing requirements, we will contact you to advise of any changes if your plan is affected.



Please see below a comprehensive list of our Investment Partners.

Investment Partner	
A	
AB Investment Solutions Ltd trading as FD Dynamic Portfolio (Clearview)	Alington Ruthin Stockbrokers and Investment Management
Aberdeen Standard Capital	Alpha Portfolio Management
Advance by Embark	Amber Financial Investments Limited
Aegon (Cofunds Ltd)	Arbuthnot Latham
AFH Independent Financial Services Limited	Artless Wealth Ltd
AJ Bell (InvestCentre)	Aubrey Capital Management Ltd
Albert E Sharp	Avellemy Private Wealth


B

Balkerne Asset Management	Bowmore Asset Management Ltd
Barclays Wealth	BRI Wealth Management plc
Barker Poland Asset Management LLP	Brighton Capital Management
Barratt & Cooke	Brooks Macdonald Asset Management Limited
Bordier & Cie (UK) plc	Brown Shipley & Co Limited
BoulterBowen WealthCare	BullionVault

C

Callanish Capital Ltd	City Asset Management plc
Canaccord Genuity Wealth Management	City of London Markets
Cardale Asset Management Limited	Close Brothers Asset Management
Casterbridge Wealth Ltd	Connor Broadley Ltd
Cazenove Capital Management	Credo Capital plc
CG Wealth Planning Limited	CS Investment Managers
Charles Stanley & Co Limited	Cube Capital Limited
Church House Investments Limited	

D

Dowgate Capital

E

EFG Harris Allday	Evelyn Partners Services Limited
Embark	

F

Fidelity Investment Services Ltd / Fidelity Funds Network	Fiske plc
Fieldings Investment Management Limited (where Charles Stanley or Smith and Williamson are used as custodian)	Fusion Wealth
First Equity Limited	


G

Global Preservation Strategies	GPIIM Limited
Gore Browne Investment Management	

H

Handelsbanken Wealth Management	Hobart Capital Markets LLP
Harris Rose & Partners	Hurley Partners Ltd
Hawksmoor Investment Management	

I

IFPC	Invest N Grow
Insignis Cash Solutions (cash platform)	Investec Wealth & Investment Limited
InterestMe Wealth	IPS Capital LLP

J

J M Finn & Co	James Hambro & Partners LLP
James Brearley & Sons	Jarvis Investment Management

K

Killik & Co	
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L

Leodis Wealth	Lombard Odier
LGT Vestra US	London Stone Securities
LGT Wealth Management	Luna Investment Management
Lincoln Private Office Ltd	



M

M&G Wealth	McInroy & Wood Limited
Manorbridge Investment Management	Metis Asset Management
Mattioli Woods plc	Mountstone Partners Ltd
MB Capital	Myddleton Croft Investment Managers

N

Novia Financial plc

O

Odey Wealth Management (UK) Limited

P

Parmenion	Progeny Asset Management Ltd
Performance Wealth Management	Prudential TIP (transaction fees will apply)
Pershing Securities Limited (please contact us to find out if any associated firms are acceptable)	Psigma Investment Management Limited
Price Value Partners Ltd	Punter Southall Wealth

Q

Quartet Investment Managers	Quilter (Old Mutual Wealth)
Quilter Cheviot Limited	

R

R C Brown Investment Management plc	Redmayne-Bentley Stockbrokers
Rathbone Investment Management Limited (including Rathbone Greenbank)	Ridgeway Investment Management
Raymond James Investment Services	Rowan Dartington
RBC Brewin Dolphin	Ruffer
Realm Investment Management Limited	


S

S I Capital	SG Kleinwort Hambros Bank Ltd
Saltus Partners LLP	Sorbus Partners LLP
Sanlam Private Investments (UK) Ltd	St Johns Asset Management
Saranac Partners Limited	Stocktrade
Sarasin & Partners	Stonehage Fleming Investment Management Limited
Schroders Personal Wealth	Succession Investment Platform
Seven Investment Management LLP	

T

T Bailey Fund Services (restrictions and transaction fees will apply, please contact us)	Transact
Tees Financial plc	Tribe Impact Capital
Thesis Asset Management	True Potential Investments LLP
Thorntons Investment Management Limited	Tyndall Investment Management
TIML (Tacit Investment Management)	

U

UBS AG	UK Portfolio Management Ltd
UK Bond Network	

V

Veritas Investment Management LLP	Voyager Asset Management
Vermeer Investment Management Limited	

W

W H Ireland	Whitechurch Securities Limited
Walker Cambria	Whitman Asset Management
Walker Crips Investment Management Limited	Williams Investment Management LLP
Waverton Investment Management	Windsor Private Office IM
Wellian Investment Solutions	Wren Sterling Wealth Platform



Please see below a comprehensive list of those investment firms which do not meet our criteria for full Investment Partner status, but with which we have established a business relationship.

Investment firm	
A	
Adam & Company	Alvarium Investment Managers (UK) LLP
Alfred Simmons Investment Management Ltd	Ashcourt Rowan
B	
Bank Leumi (UK) plc	Brown Advisory Limited
Berkeley Futures Limited	
C	
Castlefield	Courtiers
Charteris Treasury Portfolio Managers Limited	Coutts
City and Continental Ltd	Credit Suisse (UK) Limited
D	
Danske Bank	Dart Capital Limited
E	
Eighteen 48 Partners Limited	ED&F Man Capital Markets Limited

* The investment firm is currently classed as an Investment Partner but, as at the date of this document, does not meet our Investment Partner requirements and therefore further fees may become applicable in the near future - please refer to the Schedule of Fees for details of fees where a firm is not an Investment Partner. We will contact you in this instance.


F

Flagstone (Cash Platform)**	FACET Investment Management Ltd
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G

Goldman Sachs International	
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H

Havelock Hunter Stockbrokers	Henderson Rowe
Hedley & Company Stockbrokers Ltd	Heritage Capital Management Limited

J

J & E Davy	James Sharp & Co
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K

Keith Bayley Rogers	Kingswood Holdings Limited (European Wealth)*
King & Shaxson	

L

LIFT-Invest	London & Capital Asset Management Limited
Lion Trust Investment Solutions	

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** Your Future SIPP - FULL SIPP only.


M

Maunby Investment Management Ltd	Morningstar Wealth Platform
Millbank Investment Managers Limited	MPL Wealth Management
Mirabaud Asset Management	Murray Asset Management UK Limited

N

Nedbank Private Wealth Limited	Nucleus
Novia Global	

O

Oberon Investments	Octopus Investments Ltd
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P

P1 Investment Management (discretionary business)	Patronus Partners Ltd
P1 Platform (execution only business)	PB Financial Planning Ltd
Pairstech Capital Management LLP	Pembroke Asset Management LLP

R

RBC Europe Ltd	Rossie House Investment Management
Rometsch & Moor Ltd	Rothschild Private Management Limited

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**S**

Savoy Investment Management	Stanhope Capital LLP
Shore Capital Stockbrokers Limited	

T

TAM Asset Management Limited	Telford Mann
Tatton Investment Management	

U

Union Bancaire Privée, UBP SA

V

Vartan Ravenscroft

W

Womble Bond Dickinson Wealth Limited

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Notes

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Call charges will vary. We may record and monitor 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.

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