




YOUR FUTURE, OUR FOCUS

Self-invested pensions specialist

www.curtisbanks.co.uk





**What you can expect
from working with**

**one of the UK's largest
independent SIPP
and SSAS providers.**

We're SIPP and SSAS specialists.

We don't provide investments of our own, but we do provide access to the open market of investment providers, platforms and brokers. You choose who to use in our pensions.

We'll provide your client with your recommended pension, and accept your instructions to operate it effectively.

We'll provide you, and your client if required, access to our secure portal where you can view up to date information and perform a number of crucial transactions and money movements.

We'll settle the fees you agreed with your client directly from their pension.

We won't contact your clients directly unless there's regulatory or legislative imperative, and even then we'll contact you first.

When things don't go to plan, we'll investigate fairly and impartially and put things right.

What we expect of you.

We don't provide financial or investment advice. We leave that to you, the professionals.

We expect you and your clients to work within the Terms and Conditions of our pensions. They're clear, balanced and are designed to ensure that our pensions are run smoothly and within statutory rules.

We expect you to work within our agreed Terms of Business.

Working together.

Every relationship is important to us.

Working together, we can deliver the recommendation and commitments you've made to your client. We're already looking after the retirement funds of over 80,000* clients – make sure your next recommendation is for a Curtis Banks pension.

Service delivered by us.

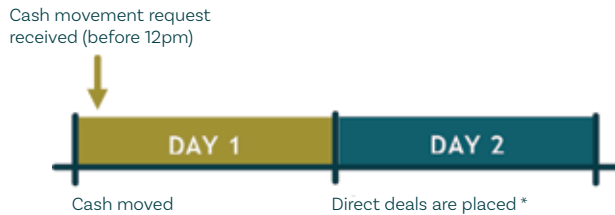
SIPPs and SSAS are complex, and no two plans or clients are the same. They can range from a simple single DFM portfolio to multi-investor multi-property syndicates with borrowing. But there are some constants across all plans where we can commit our service levels to you.

New applications



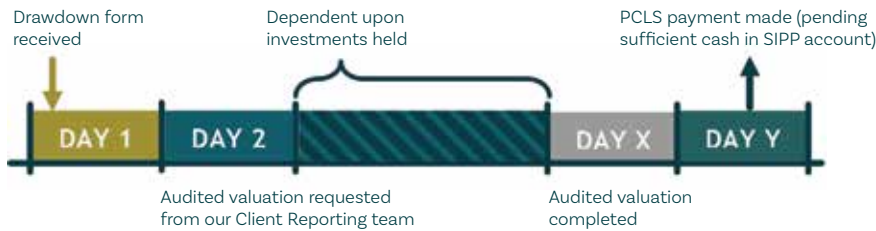
* Where transfer discharge forms are sent, we confirm receipt of these with ceding providers and confirm this to you.

Investing

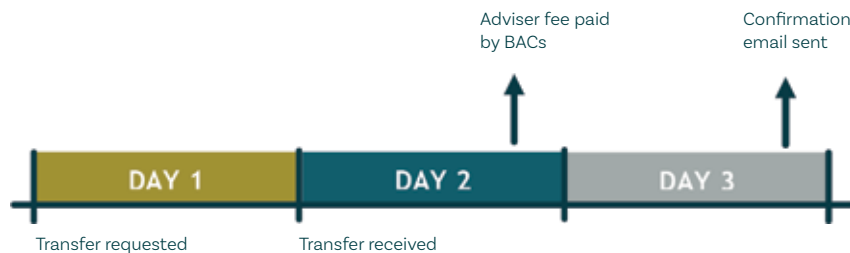


* The requirements for a direct deal can change per provider, therefore please ensure the correct paperwork is provided

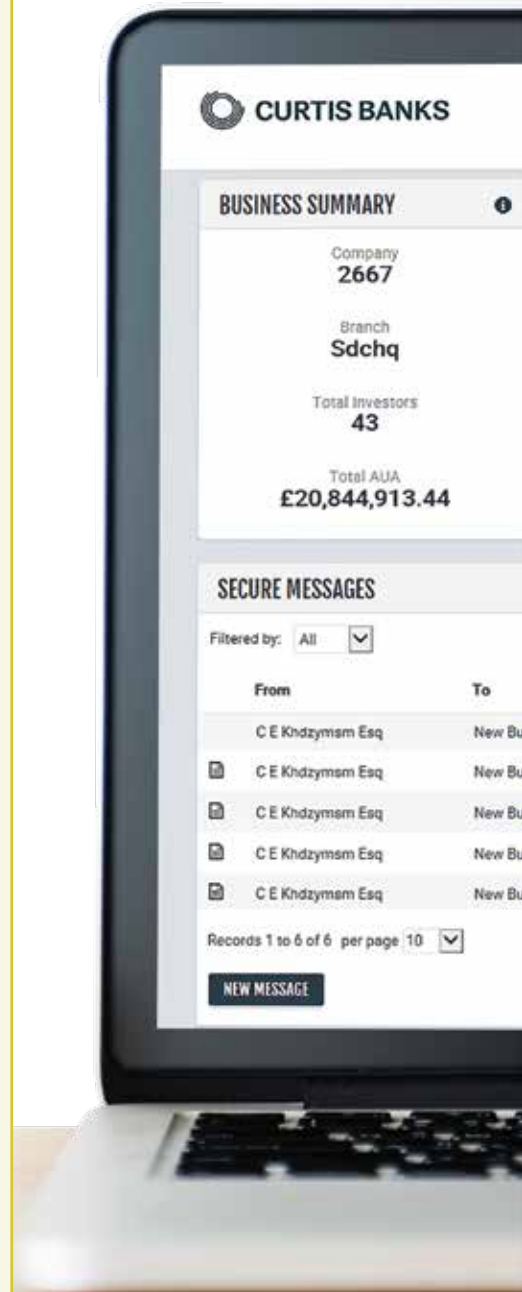
Drawing benefits



Auto adviser charging (initial)



* We settle initial and adhoc adviser charges in addition to regular adviser charging.



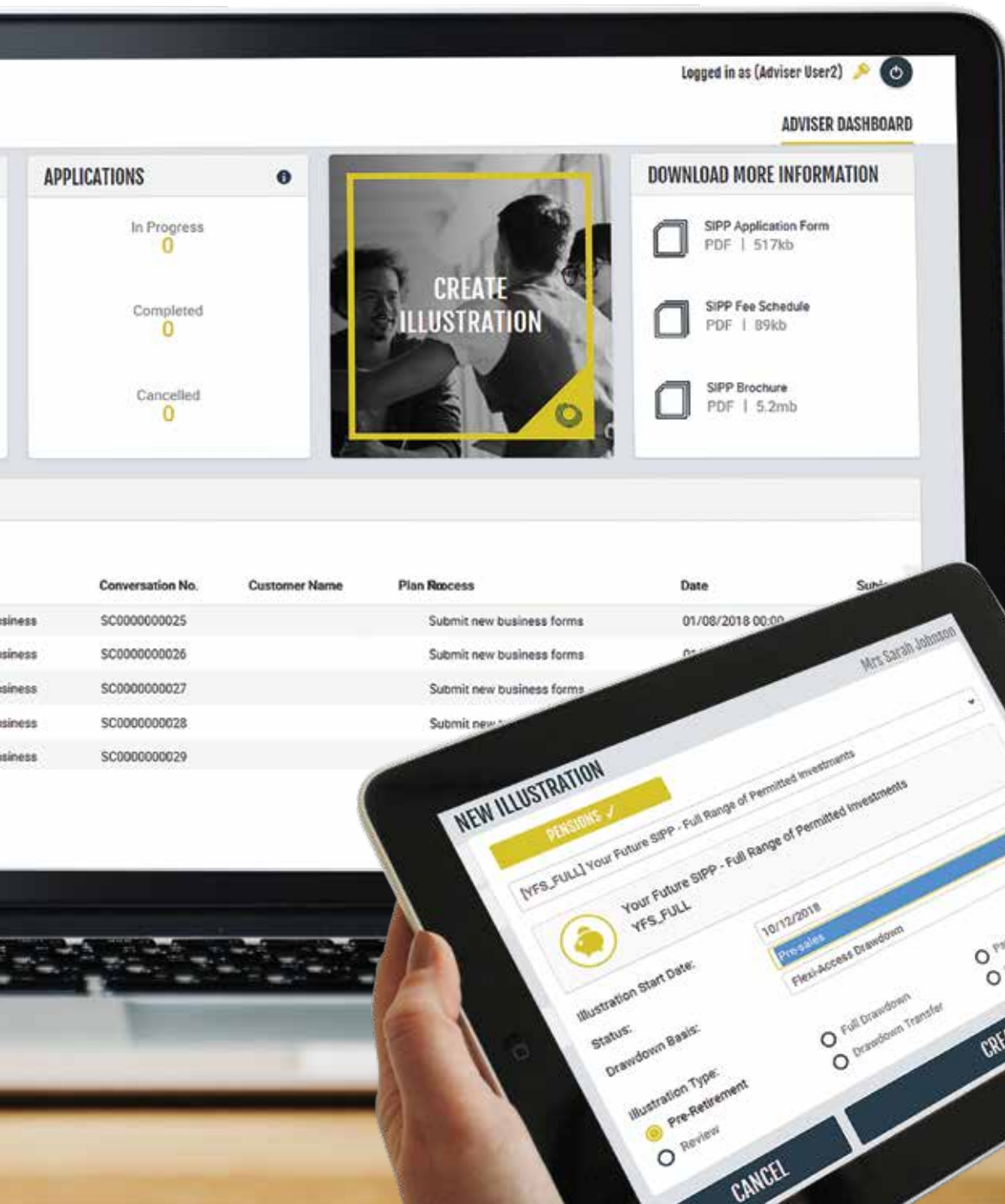
Service directed by you.

Portal access comes as standard with all our pensions. We're only a phone call away but our pensions are also available at the click of a mouse.

Online you can:

- See an overview of all your clients
- Create, amend and store illustrations
- Set and request your fees
- Send and receive secure messages
- Drill down into plan level analysis for:
 - Investments and property held within the SIPP as well as bank accounts
 - Bank transactions
 - Contribution history
 - Transfers In
 - Drawdown details
 - Income payments history and current tax code on record.

* The above portal functionality currently only applies for Your Future SIPP, SSAS and other heritage products coming soon.



The future's here already.

All our expertise and experience is bundled into one pension – **Your Future SIPP**. What's more, your client only pays for the functionality that they use, making it incredibly flexible and cost effective.

With no set up fees, our highly competitive entry level annual fee gives you and your client access to a huge range of investment platforms, brokers and wealth managers. The flexibility extends right up to our leading commercial property expertise, where we already look after over 6,200* commercial properties across the UK, making us one of Europe's largest landlords.

- ✓ *NO SET-UP FEES*
- ✓ *ANNUAL FEES FROM £310*
- ✓ *ONLINE ACCESS INCLUDED*
- ✓ *YOUR FEES PAID FROM THE SIPP*



Your Future SIPP. The only pension you'll ever need.

More about Curtis Banks

Curtis Banks has years of experience administering self-invested personal pensions. We look after the pensions of over 80,000 clients with a value in excess of £36.0 billion*. Those pensions are administered by around 600 staff across our three offices in Ipswich, Dundee and Bristol – our head office.

We are a strong and stable provider, here for the long term and have received a financial strength assessment of B 'Strong' from AKG. We have also received 5 star ratings from Defaqto and Moneyfacts for Your Future SIPP.

Curtis Banks is listed on the AIM Stock Exchange (LON: CBP).

You can find out more information about us on our website at:

curtisbanks.co.uk





We're also on Facebook at facebook.com/curtisbankspensions, where you can learn more about our charitable and community work. You can also follow us on Twitter [@_CurtisBanks](https://twitter.com/_CurtisBanks), and we're worth a follow on LinkedIn too.



**For further information please contact your local Business Development Manager,
or contact our Sales team:**

Phone: 01473 296 950

Email: enquiries@curtisbanks.co.uk

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.

* Figures correct as of 30 June 2021.

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