

PRESS RELEASE

CURTIS BANKS ADDS PRUDENTIAL TIP TO YOUR FUTURE SIPP

2 AUGUST 2019

Curtis Banks, one of the UK's largest independent SIPP operators has today announced the introduction of the Prudential Trustee Investment Plan (Pru TIP) to Your Future SIPP.

Dave Stratton, Group Sales Director, Curtis Banks commented:

“Advisers use the Pru TIP more and more to help protect the investments held by their clients as it provides smooth returns and works well in a blended portfolio. It is a natural addition to our recently launched Your Future SIPP, adding increased flexibility for advisers and their clients.”

The Pru TIP is widely used by advisers, to smooth client investment returns as part of a blended portfolio, it can be accessed by the recently launched Your Future SIPP at an annual SIPP fee of £260 + VAT. Accessing the Pru TIP with an independent pensions wrapper such as Your Future SIPP provides advisers with total control over the investment strategy and client relationship.

David Waltham, SKD Financial Services Ltd said: “We use the PruFund as a way of de-risking client portfolios and providing some hedge against volatility. The fact that we can now easily combine PruFund with other investment strategies within Your Future SIPP is a real advantage for us.”

The Pru TIP complements the flexibility of Your Future SIPP by allowing advisers and their clients to tailor investments to suit the clients' individual attitude to risk with ease, and provides fund targeted withdrawals for added volatility control. Using an independent platform also means that the adviser may benefit from additional investment flexibility through using other investment partners or solutions within the SIPP.

Gavin Wise, Owner, Wise Financial Consulting said: "Using the Curtis Banks SIPP allows me to offer my clients the best of both worlds when it comes to investment strategy. Prudential is by far the most popular product on the market due to its smoothing process and expected growth rates with low volatility but where it doesn't answer all my client's needs is for those that wish to have some differing level of risk via Managed Portfolios such as those with Verbatim. I can now use Prudential via the Curtis Bank SIPP to secure a base level of income and blend this with my Portfolios for potentially increased growth / increased income. A perfect blend and long overdue - well done Curtis Banks."

Your Future SIPP offers the client true diversification making it the only pension they will ever need.

Vince Smith-Hughes, Director of Specialist Business Support at Prudential UK said: “The PruFund range is incredibly popular with many financial advisers as an investment proposition for their clients who are at or in retirement. The link with Curtis Banks makes it more cost effective for advisers to blend PruFund with other investment solutions such as a Discretionary Fund Manager (DFM) or other investment partner.”

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Further information

Curtis Banks administers self-invested pension products, principally SIPPs and SSAs. 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.

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