



# INVESTMENT, SIM AND SMART PARTNERS

For Heritage Products of Curtis Banks  
and Suffolk Life



## Investment, Sim and Smart Partners

Please find below a list of investment firms with which Curtis Banks currently has a relationship for heritage products of Curtis Banks and Suffolk Life.

Investment Partners (e-affiliates) provide an integrated, fee-saving option by reporting data to us electronically. 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](http://www.curtisbanks.co.uk).

Whilst you can choose any investment firm listed below, we have created a panel of Partners for the Suffolk Life Single Investment Manager SIPP and the SmartSIPP.

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 (e-affiliate), 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.

## Investment firms

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
Aberdeen Standard Capital	✓	✓		
Adam & Company				
Aegon (Cofunds Ltd)	✓	✓		✓
AFH Independent Financial Services Limited	✓	✓	✓	
Albert E Sharp	✓	✓		
Alfred Simmons Investment Management Ltd				
Alington Ruthin Stockbrokers and Investment Management		✓		
Alpha Portfolio Management	✓	✓	✓	
Alvarium Investment Managers (UK) LLP				
Amber Financial Investments Limited	✓	✓		
Andrews Gwynne LLP*	✓	✓		
Arbuthnot Latham	✓	✓		
Artless Wealth Ltd		✓		
Ascentric	✓	✓		✓
Ashcourt Rowan				
Aubrey Capital Management Ltd		✓		
Avellemy Private Wealth		✓		

## B

Balkerne Asset Management	✓	✓		
Bank Leumi (UK) plc				
Barclays Wealth*	✓	✓	✓	
Barker Poland Asset Management LLP	✓	✓		
Barratt & Cooke		✓		
Berkeley Futures Limited				
Bordier & Cie (UK) Plc	✓	✓		
BoulterBowen WealthCare	✓	✓		
Bowmore Asset Management Ltd	✓	✓		
Brewin Dolphin Limited	✓	✓	✓	
BRI Wealth Management plc	✓	✓	✓	
Brighton Capital Management		✓		
Brooks Macdonald Asset Management Limited	✓	✓	✓	
Brown Advisory Limited				
Brown Shipley & Co Limited	✓	✓		
BullionVault	✓	✓		

\* 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## C

Canaccord Genuity Wealth Management	✓	✓	✓	
Cardale Asset Management Limited	✓	✓		
Casterbridge Wealth Ltd	✓	✓		
Castlefield				
Cazenove Capital Management	✓	✓	✓	
CG Wealth Planning Limited	✓	✓		
Charles Stanley & Co Limited	✓	✓	✓	
Charteris Treasury Portfolio Managers Limited				
Church House Investments Limited	✓	✓		
City and Continental Ltd				
City Asset Management plc	✓	✓	✓	
City of London Markets		✓		
Close Brothers Asset Management	✓	✓	✓	
Connor Broadley Ltd	✓	✓		
Cornhill Capital		✓		
Courtiers				
Coutts				
Credit Suisse (UK) Limited				
Credo Capital plc	✓	✓		
CS Investment Managers	✓	✓		

## D

Danske Bank				
Dart Capital Limited				
Dowgate Capital Limited		✓		

## E

ED&F Man Capital Markets Limited				
EFG Harris Allday		✓		
Embark	✓	✓		
Epoch Wealth Management Ltd	✓			

\* 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## F

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

## G

Global Preservation Strategies	✓	✓		
Goldman Sachs International				
Gore Browne Investment Management	✓	✓		
GPIM Limited	✓	✓		

## H

Handelsbanken Wealth Management	✓	✓	✓	
Harris Rose & Partners	✓	✓		
Havelock Hunter Stockbrokers				
Hawksmoor Investment Management	✓	✓	✓	
Hedley & Company Stockbrokers Ltd				
Henderson Rowe				
Heritage Capital Management Limited				
HFM Columbus	✓			
Hobart Capital Markets LLP		✓		
Holden and Partners LLP	✓			
Hurley Partners Ltd	✓	✓		

## I

IFPC				
Insignis Cash Solutions (cash platform)	✓	✓	✓	✓
Investec Wealth & Investment Limited	✓	✓	✓	
IPS Capital LLP	✓	✓		

\* 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## J

J & E Davy				
J M Finn & Co	✓	✓	✓	
James Brearley & Sons	✓	✓	✓	
James Hambro & Partners LLP	✓	✓	✓	
James Sharp & Co				
Jarvis Investment Management	✓	✓		

## K

Keith Bayley Rogers				
Killik & Co	✓	✓		
Kingswood Holdings Limited (European Wealth)				

## L

Leodis Wealth	✓	✓	✓	
LGT Vestra LLP	✓	✓	✓	
LGT Vestra US	✓	✓		
LIFT-Invest	✓			✓
Lincoln Private Office Ltd		✓		
Lion Trust Investment Solutions				
Lloyds Private Banking (closed to new business, existing business only)		✓		
Lombard Odier*				
London & Capital Asset Management Limited				
London Stone Securities		✓		
Luna Investment Management		✓		

\* 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## M

Manorbridge Investment Management	✓	✓		
Mattioli Woods plc	✓	✓		
Maunby Investment Management Ltd				
Mayfair Capital Ltd	✓	✓		
MB Capital		✓		
McInroy & Wood Limited	✓	✓	✓	
Metis Asset Management	✓	✓		
Millbank Investment Managers Limited				
Mirabaud Asset Management				
Mountstone Partners Ltd	✓	✓		
MPL Wealth Management				
Murray Asset Management UK Limited				
Myddleton Croft Investment Managers	✓	✓		

## N

Nedbank Private Wealth Limited				
Novia Financial plc	✓	✓		
Novia Global	✓			
Nucleus	✓			

## O

OCM Wealth Management Ltd	✓			
Octopus Investments Ltd				
Odey Wealth Management (UK) 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## P

P1 Investment Management (discretionary business)				
P1 Platform (execution only business)				
Pairstech Capital Management LLP				
Parmenion	✓	✓		✓
Patronus Partners Ltd				
PB Financial Planning Ltd				
Pembroke Asset Management LLP				
Performance Wealth Management		✓		
Pershing Securities Limited (please contact us to find out if any associated firms are acceptable)	✓	✓		
Praemium Ltd				
Price Value Partners Ltd		✓		
Progeny Asset Management Ltd				
Psigma Investment Management Limited	✓	✓	✓	
Punter Southall Wealth	✓	✓		

## Q

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

## R

R C Brown Investment Management plc	✓	✓		
Rathbone Investment Management Limited (including Rathbone Greenbank Investments)	✓	✓	✓	
Raymond James Investment Services	✓	✓	✓	✓
RBC Europe Ltd				
Realm Investment Management Limited	✓	✓		
Redmayne-Bentley Stockbrokers	✓	✓	✓	
Ridgeway Investment Management	✓	✓	✓	
Rometsch & Moor Ltd				
Rossie House Investment Management				
Rothschild Private Management Limited				
Rowan Dartington	✓	✓	✓	
Ruffer	✓	✓		

\* 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.



Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## S

Saltus Partners LLP		✓		
Sanlam Private Investments (UK) Ltd	✓	✓		
Saranac Partners Limited		✓	✓	
Sarasin & Partners		✓		
Savoy Investment Management				
Schroder & Co Limited				
Seven Investment Management LLP	✓	✓	✓	✓
SG Kleinwort Hambros Bank Ltd	✓	✓	✓	
The Share Centre Ltd	✓			
Shore Capital Stockbrokers Limited				
Smith & Williamson Investment Management	✓	✓	✓	
Sorbus Partners LLP		✓		
St James's Place Retirement Plan	✓			
St Johns Asset Management	✓	✓		
Standard Life Savings Ltd	✓			
Stanhope Capital LLP				
Stocktrade	✓	✓		✓
Stonehage Fleming Investment Management Limited				
Succession Investment Platform	✓	✓		✓

## T

T Bailey Fund Services (restrictions and transaction fees will apply, please contact us)		✓		
TAM Asset Management Limited	✓			
Tatton Investment Management				
Tee Financial plc		✓		
Telford Mann				
Thesis Asset Management	✓	✓	✓	
Thorntons Investment Management Limited				
Tilney	✓	✓	✓	
Tilney for Professionals (MPS)	✓	✓	✓	
TIML	✓	✓	✓	
Transact	✓	✓		
Tribe Impact Capital	✓	✓		
True Potential Investments LLP	✓	✓	✓	✓
Tyndall Investment Management				

\* 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.

Investment firm	Investment Partner for Curtis Banks Heritage products	Investment Partner for Suffolk Life Heritage products	Sim Partner	Smart Partner
-----------------	---	---	-------------	---------------

## U

UBS AG	✓	✓		
UK Bond Network		✓		
UK Portfolio Management Ltd	✓	✓		

## V

Vartan Ravenscroft				
Veritas Investment Management LLP	✓	✓		
Vermeer Investment Management Limited	✓	✓	✓	
Vintage Asset Management	✓			
Voyager Wealth Management Limited		✓	✓	
VWM Consulting Ltd	✓			

## W

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

\* 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.



## Notes

Curtis Banks Group plc,  
3 Temple Quay,  
Bristol, BS1 6DZ

T 0117 910 7910  
F 0117 929 2514  
curtisbanks.co.uk

**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.

Curtis Banks Group plc (registered number 07934492) and Curtis Banks Limited (registered number 06758825) are companies registered in England & Wales with their registered addresses at 3 Temple Quay, Bristol BS1 6DZ. Curtis Banks Limited is authorised and regulated by the Financial Conduct Authority (number 492502).

Curtis Banks Pensions is a trading name of Suffolk Life Pensions Limited. Suffolk Life Pensions Limited is a company registered in England & Wales (registered number 1180742) and is authorised and regulated by the Financial Conduct Authority (number 116298). Suffolk Life Annuities Limited is a company registered in England & Wales (registered number 1011674) and is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (number 110468). The registered address of both companies is 153 Princes Street, Ipswich, Suffolk IP1 1QJ.  
SL176.202109.2 September 2021

