

CHANGES TO CURTIS BANKS ANNUAL SIPP ADMINISTRATION FEE FROM 1 FEBRUARY 2021

APPROVED FOR ADVISER USE | NOVEMBER 2020



THIS IS NOT A CONSUMER ADVERTISEMENT. IT IS INTENDED FOR PROFESSIONAL FINANCIAL ADVISERS AND SHOULD NOT BE RELIED UPON BY PRIVATE CUSTOMERS OR ANY OTHER PERSONS

Changes to Curtis Banks annual SIPP administration fee for mid and full SIPP products

As communicated, we will be adjusting our pricing structure which will lead to an increase in the annual SIPP administration fee charged for our mid and full SIPP products. This is a focused increase and we are not increasing any other fees across our products.

The full SIPP annual administration fee will increase by £140, and the mid SIPP annual administration fee will increase by £50.

This is applicable to the following products, effective from 1 February 2021:

Product	Current annual fee	Annual fee from 1 February 2021
Your Future SIPP - accessing full investment options	£580	£720
Your Future SIPP - accessing investment partners and/or one fixed deposit	£260	£310
Suffolk Life MasterSIPP	£580	£720
Suffolk Life MasterSIPP (holding former Protected Rights) - where only plan	£580	£720
Suffolk Life MasterSIPP (holding former Protected Rights) - where second/subsequent plan	£290	£430
Suffolk Life SIPP	£680	£820
Suffolk Life SimSIPP	£260	£310
Suffolk Life SmartSIPP	£310	£360
Curtis Banks SIPP - accessing full investment options	£580	£720
Curtis Banks SIPP - accessing mid investment options	£260	£310
Curtis Banks Full SIPP - accessing full investment options	£580	£720
Curtis Banks Full SIPP - accessing mid investment options	£260	£310
Curtis Banks ST SIPP - accessing full investment options	£580	£720

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Product	Current annual fee	Annual fee from 1 February 2021
Curtis Banks ST SIPP - accessing mid investment options	£260	£310
Curtis Banks Universal SIPP - accessing full investment options	£580	£720
Curtis Banks Universal SIPP - accessing mid investment options	£260	£310
Curtis Banks 2002 SIPP - accessing full investment options	£580	£720
Curtis Banks 2002 SIPP - accessing mid investment options	£260	£310
Curtis Banks 2005 SIPP - accessing full investment options	£580	£720
Curtis Banks 2005 SIPP - accessing mid investment options	£260	£310
Montpelier SIPP - accessing full investment options	£580	£720
Montpelier SIPP - accessing mid investment options	£260	£310
Montpelier Protected Rights SIPP - accessing full investment options	£580	£720
Montpelier Protected Rights SIPP - accessing mid investment options	£260	£310
MPAS SIPP - accessing full investment options	£580	£720
MPAS SIPP - accessing mid investment options	£260	£310
Temple Quay SIPP - accessing full investment options	£580	£720
Temple Quay SIPP - accessing mid investment options	£260	£310
Prydis SIPP - accessing full investment options	£580	£720
Prydis SIPP - accessing mid investment options	£260	£310
The Pointon York SIPP - accessing full investment options	£580	£720
The Pointon York SIPP - accessing mid investment options	£260	£310
The Pointon York Self Invested Personal Pension - accessing full investment options	£580	£720
The Pointon York Self Invested Personal Pension- accessing mid investment options	£260	£310
The PY SIPP - accessing full investment options	£580	£720
The PY SIPP - accessing mid investment options	£260	£310
The PY Protected Rights Scheme - accessing full investment options	£580	£720
The PY Protected Rights Scheme - accessing mid investment options	£260	£310
The Pathfinder Private Pension- accessing full investment options	£580	£720
The Pathfinder Private Pension - accessing mid investment options	£260	£310

If you have any questions, please get in touch with your usual business development manager or by contacting your usual Curtis Banks representative. Alternatively please visit our website curtisbanks.co.uk and search via the Contact page to direct you to the correct team.