

# 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, regular 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
-----------------	---	---	-------------	---------------

### A

AB Investment Solutions Ltd trading as FD Dynamic Portfolio ( <a href="#">Clearview</a> )	✓	✓	✓	✓
Aberdeen Standard Capital	✓	✓		
Aegon (Cofunds Ltd)	✓	✓		✓
AFH Independent Financial Services Limited	✓	✓	✓	
AJ Bell (InvestCentre)	✓	✓		
AJ Bell (YouInvest)				
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 ( <a href="#">Curtis Banks SIPP only</a> )	✓			
Arbuthnot Latham	✓	✓		
Artless Wealth Ltd	✓	✓		
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	✓	✓		
BRI Wealth Management plc	✓	✓	✓	
Brighton Capital Management		✓		
Brooks Macdonald Asset Management Limited	✓	✓	✓	
Brown Advisory Limited				
Brown Shipley & Co Limited	✓	✓	✓	
BullionVault	✓	✓		
Bullseye Financial 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
-----------------	---	---	-------------	---------------

## C

Callanish Capital Ltd		✓	✓	
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	✓	✓		
Courtiers*				
Coutts				
Credit Suisse (UK) Limited				
Credo Capital plc	✓	✓		
CS Investment Managers	✓	✓		

\* Courtiers is closed for new business following restrictions put in place by the FCA.

## D

Danske Bank				
Dart Capital Limited				
Dowgate Capital Limited		✓		

\* Dowgate Capital Limited is closed for new business following restrictions put in place by the FCA.

## E

Eighteen 48 Partners Limited*	✓	✓	✓	✓
ED&F Man Capital Markets Limited				
EFG Harris Allday		✓		
Epoch Wealth Management Ltd	✓			
EQ Investors	✓	✓	✓	✓
Evelyn Partners Services 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
-----------------	---	---	-------------	---------------

## 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		✓		
Flagstone (Cash Platform)	✓	✓		
Fundment				
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)	✓	✓	✓	✓
InterestMe Wealth		✓		
Invest N Grow		✓		
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				

## K

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

## L

Leodis Wealth	✓	✓	✓	
LGT Vestra US	✓	✓		
LGT Wealth Management	✓	✓	✓	
LIFT-Invest	✓			✓
Lincoln Private Office Ltd		✓		
Lion Trust Investment Solutions				
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

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

## N

Nedbank Private Wealth Limited				
Novia Global	✓			
Nucleus Wrap	✓	✓		

## O

Oakglen Wealth Limited	✓	✓	✓	✓
Oberon Wealth				
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)	✓	✓		
Price Value Partners Ltd		✓		
Progeny Asset Management Ltd				
Psigma Investment Management Limited	✓	✓	✓	
Ptarmigan Capital	✓	✓	✓	✓

## 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 Brewin Dolphin	✓	✓	✓	
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				
Schroders Personal Wealth		✓		
Scottish Widows	✓	✓		
Scottish Widows Platform				
Seven Investment Management LLP	✓	✓	✓	✓
SG Kleinwort Hambros Bank Ltd	✓	✓	✓	
The Share Centre Ltd	✓			
Shore Capital Stockbrokers Limited *	✓	✓	✓	✓
S I Capital		✓		
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 ( <a href="#">restrictions and transaction fees will apply, please contact us</a> )		✓		
TAM Asset Management Limited	✓	✓	✓	✓
Tatton Investment Management				
Tees Financial plc		✓		
Telford Mann				
Thesis Asset Management	✓	✓	✓	
Thorntons Investment Management Limited		✓		
TIML (Tacit Investment Management)	✓	✓	✓	
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	✓	✓		
Union Bancaire Privée, UBP SA				

## 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	✓	✓	✓	
Wealthtime	✓	✓		
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 0370 414 7000  
F 0370 414 8000  
curtisbanks.co.uk

**Call charges will vary. We may record and monitor calls.**

"Curtis Banks" is the trading name of Curtis Banks Group Limited (CBGL) (registered in England, number 07934492), Curtis Banks Limited (CBL) (registered in England, number 06758825), Suffolk Life Pensions Limited (SLPL) (registered in England, number 01180742), Suffolk Life Annuities Limited (SLAL) (registered in England, number 01011674), SLA Property Company Limited (SLAPC) (registered in England, number 01203396), Tower Pension Trustees (S-B) Limited (TPTSB) (registered in Scotland, number SC340871), Bridgewater Pension Trustees Limited (BPTM) (registered in England, number 03821053), SPS Trustees Limited (SPST) (registered in England, number 08312411), Colston Trustees Limited (CTL) (registered in England, number 06867955), Montpelier Pension Trustees Limited (MPTL) (registered in England, number 5802677), Temple Quay Pension Limited (TQPL) (registered in England, number 05679427), Tower Pension Trustees Limited (TPTL) (registered in England, number 02178783), Crescent Trustees Limited (CrTL) (registered in England, number 03915165). "Curtis Banks Pensions" is the trading name of SLPL. CBGL, CBL, TPTSB, BPTM, SPST, CTL, MPTL, TQPL, TPTL, CrTL have their registered office at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP. SLPL, SLAL, SLAPC have their registered office at 153 Princes Street, Ipswich, Suffolk, IP1 1QJ. CBL and SLPL are authorised and regulated by the Financial Conduct Authority. SLAL is authorised as an insurance company authorised by Prudential Regulation Authority (PRA) and regulated by the FCA and PRA. CBGL, CBL, BPTL, CTL, SPSTL, MPTL, TQPL, TPTL, CrTL and TPTSB are members of a VAT group with VAT registration number 207996471. SLPL, SLAL and SLAPC are members of a VAT group with VAT registration number 241841520. All companies are wholly owned subsidiaries of Nucleus Financial Platforms Limited (registered in England, number 06033126) whose registered office is at Suite B & C, First Floor, Milford House, 43-55 Milford Street, Salisbury, SP1 2BP, and are members of the Nucleus Group. Further details of the Nucleus Group can be found at [nucleusfinancial.com](http://nucleusfinancial.com).  
(12/24)

SL176.202504  
April 2025

