

YOUR FUTURE SIPP

Full list of Investment Partners and firms

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Your future, our focus.

curtisbanks.co.uk



Full list of Investment Partners and firms

Please find below a list of investment firms that you can select for Your Future SIPP.

Whilst you can choose any investment firm listed below, we have created a panel of Investment Partners that provide an integrated option by reporting data to us electronically, allowing us to pass on fee savings to you. 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.

If Curtis Banks are required to place any transactions directly with an Investment Partner (for example a purchase, sale or switch), we will charge transaction fees as if they were directly held investments. Please see the Your Future SIPP Schedule of Fees for further information on these fees.

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, 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. The panel of investment firms is reviewed regularly and if any investment firms fail to meet our ongoing requirements, we will



Please see below a comprehensive list of our Investment Partners.

Investment Partner	
A	
AB Investment Solutions Ltd trading as FD Dynamic Portfolio (Clearview)	Alpha Portfolio Management
Aberdeen Standard Capital	Amber Financial Investments Limited
Aegon (Cofunds Ltd)	Arbuthnot Latham
AFH Independent Financial Services Limited	Artless Wealth Ltd
AJ Bell (InvestCentre)	Aubrey Capital Management Ltd
Albert E Sharp	Avellemy Private Wealth
Alington Ruthin Stockbrokers and Investment Management	



B

Balkerne Asset Management	BRI Wealth Management plc
Barclays Wealth	Brighton Capital Management
Barker Poland Asset Management LLP	Brooks Macdonald Asset Management Limited
Barratt & Cooke	Brown Shipley & Co Limited
Bordier & Cie (UK) plc	BullionVault
BoulterBowen WealthCare	Bullseye Financial Limited
Bowmore Asset Management Ltd	

C

Callanish Capital Ltd	Church House Investments Limited
Canaccord Genuity Wealth Management	City Asset Management plc
Cardale Asset Management Limited	City of London Markets
Casterbridge Wealth Ltd	Connor Broadley Ltd
Cazenove Capital Management	Credo Capital plc
CG Wealth Planning Limited	CS Investment Managers
Charles Stanley & Co Limited	Cube Capital Limited
Charteris Treasury Portfolio Managers Limited	

D

Dowgate Capital

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

E

EFG Harris Allday	Evelyn Partners Services Limited
EQ Investors	

F

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



G

Global Preservation Strategies	GPIM Limited
Gore Browne Investment Management	

H

Handelsbanken Wealth Management	Hobart Capital Markets LLP
Harris Rose & Partners	Hurley Partners Ltd
Hawksmoor Investment Management	

I

IFPC	Invest N Grow
Insignis Cash Solutions (cash platform)	Investec Wealth & Investment Limited
InterestMe Wealth	IPS Capital LLP

J

J M Finn & Co	James Hambro & Partners LLP
James Brearley & Sons	

K

Killik & Co	Kingswood Holdings Limited (European Wealth)
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L

Leodis Wealth	Lombard Odier
LGT Vestra US	London Stone Securities
LGT Wealth Management	Luna Investment Management
Lincoln Private Office Ltd	



M

M&G Wealth	McInroy & Wood Limited
Manorbridge Investment Management	Metis Asset Management
Marlborough Investment Management Limited	Mountstone Partners Ltd
Mattioli Woods plc	MPL Wealth Management Ltd
MB Capital	Myddleton Croft Investment Managers

N

Nucleus Wrap

O

Oakglen Wealth Limited	Odey Wealth Management (UK) Limited
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P

Parmenion	Progeny Asset Management Ltd
Patronus Partners Ltd	Prudential TIP (transaction fees will apply)
Performance Wealth Management	Psigma Investment Management Limited
Pershing Securities Limited (please contact us to find out if any associated firms are acceptable)	Ptarmigan Capital
Price Value Partners Ltd	

Q

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

R

R C Brown Investment Management plc	Redmayne-Bentley Stockbrokers
Rathbone Investment Management Limited (including Rathbone Greenbank)	Ridgeway Investment Management
Raymond James Investment Services	Rowan Dartington
RBC Brewin Dolphin	Ruffer
Realm Investment Management Limited	



S

S I Capital	Seven Investment Management LLP
Saltus Partners LLP	SG Kleinwort Hambros Bank Ltd
Sanlam Private Investments (UK) Ltd	Sorbus Partners LLP
Saranac Partners Limited	St Johns Asset Management
Sarasin & Partners	Stocktrade
Schroders Personal Wealth	Stonehage Fleming Investment Management Limited
Scottish Widows (excluding Scottish Widows Platform)	Succession Investment Platform

T

T Bailey Fund Services (restrictions and transaction fees will apply, please contact us)	Transact
TAM Asset Management Ltd	Tribe Impact Capital
Tees Financial plc	TrinityBridge Limited
Thesis Asset Management	True Potential Investments LLP
Thorntons Investment Management Limited	Tyndall Investment Management
TIML (Tacit Investment Management)	

U

UBS AG	UK Portfolio Management Ltd
UK Bond Network	

V

Veritas Investment Management LLP	Verso Financial Management Limited
Vermeer Investment Management Limited	Voyager Asset Management

W

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

Please see below a comprehensive list of those investment firms which do not meet our criteria for full Investment Partner status, but with which we have established a business relationship.

Investment firm	
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A

AJ Bell (YouInvest)*	Alvarium Investment Managers (UK) LLP
Alfred Simmons Investment Management Ltd	Ashcourt Rowan

* AJ Bell (YouInvest) is not classified as an Investment Partner and will therefore be subject to Full SIPP Fees.

B

Bank Leumi (UK) plc	Brown Advisory Limited
Berkeley Futures Limited	

C

Castlefield	Coutts
City and Continental Ltd	Credit Suisse (UK) Limited
Courtiers*	

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

D

Danske Bank	Dart Capital Limited
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E

Eighteen 48 Partners Limited*	ED&F Man Capital Markets Limited
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* 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.



F

FACET Investment Management Ltd	Flagstone (Cash Platform)**
Fundment	

G

Goldman Sachs International	
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H

Havelock Hunter Stockbrokers	Henderson Rowe
Hedley & Company Stockbrokers Ltd*	Heritage Capital Management Limited

J

J & E Davy	James Sharp & Co
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K

Keith Bayley Rogers	King & Shaxson
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L

LIFT-Invest	London & Capital Asset Management Limited
Lion Trust Investment Solutions	

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** Your Future SIPP - FULL SIPP only.



M

Maunby Investment Management Ltd	Morningstar Wealth Platform
Millbank Investment Managers Limited	Murray Asset Management UK Limited
Mirabaud Asset Management	

N

Nedbank Private Wealth Limited	Nucleus
Novia Global	

O

Oberon Investments	Octopus Investments Ltd
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P

P1 Investment Management (discretionary business)	PB Financial Planning Ltd
P1 Platform (execution only business)	Pembroke Asset Management LLP
Pairstech Capital Management LLP	

R

RBC Europe Ltd	Rossie House Investment Management
Rometsch & Moor Ltd	Rothschild Private Management Limited

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S

Savoy Investment Management	Shore Capital Stockbrokers Limited
Scottish Widows Platform	Stanhope Capital LLP*

T

TAM Asset Management Limited	Telford Mann
Tatton Investment Management	

U

Union Bancaire Privée, UBP SA

V

Vartan Ravenscroft

W

Womble Bond Dickinson Wealth Limited

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Notes

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

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SL168.202505
May 2025

