

YOUR FUTURE SIPP

Full list of Investment Partners and firms

DECEMBER 2025

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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 contact you to advise of any changes if your plan is affected.



Please see below a comprehensive list of our Investment Partners.

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



B

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| Balkerne Asset Management | BRI Wealth Management plc |
| Barclays Investment Services | 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

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

D

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

E

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| EFG Private Bank Limited (Trading as EFG Harris Allday) | Evelyn Partners Services Limited |
| EQ Investors | |

F

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| 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 | |

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



G

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| Global Preservation Strategies | GPIM Limited |
| Gore Browne Investment Management | |

H

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

I

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| IFPC | Intrinsic Capital London Limited |
| Insignis Cash Solutions (cash platform) | Invest N Grow |
| InterestMe Wealth | IPS Capital LLP |

J

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

K

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| Killik & Co | KW Investment Management Ltd |
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L

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



M

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

N

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| Natwest Bank | Nucleus Wrap |
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O

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| Oakglen Wealth Limited | Optiva Securities Limited |
| Odey Wealth Management (UK) Limited | |

P

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| 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

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

R

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| 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 | Royal Bank of Scotland |
| Realm Investment Management Limited | Ruffer |



S

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|------------------------------------------------------------------------|-------------------------------------------------|
| S I Capital | Seven Investment Management LLP |
| Saltus Partners LLP | 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

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

U

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| UBS AG | UK Portfolio Management Ltd |
| UK Bond Network | Union Bancaire Privée (UK) Limited |

V

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| Vermeer Investment Management Limited | Voyager Asset Management |
| Verso Financial Management Limited | |

W

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| 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

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| 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

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

C

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| 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

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| Danske Bank | Dart Capital Limited |
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E

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| 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

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

G

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| Goldman Sachs International | |
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H

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

J

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| J & E Davy | James Sharp & Co |
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K

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| Keith Bayley Rogers | King & Shaxson |
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L

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

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** Your Future SIPP - FULL SIPP only.



M

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

N

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| Nedbank Private Wealth Limited | Nucleus |
| Novia Global | |

O

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| Oberon Investments Limited | Octopus Investments Ltd |
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P

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

R

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

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S

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

T

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| TAM Asset Management Limited | Telford Mann |
| Tatton Investment Management | |

U

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| Union Bancaire Privée, UBP SA |
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V

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| Vartan Ravenscroft |
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W

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| Womble Bond Dickinson Wealth Limited |
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** This firm is closed to new business and no new applications will be accepted.

Notes

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0370 414 7000, or via the Typetalk service on 18001 0370 414 7000.

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

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