

YOUR FUTURE SIPP

Full list of Investment Partners and firms

JANUARY 2026

Investment Partners, pages 2 - 6

Investment firms, pages 7 - 10

Your future, our focus.

[curtisbanks.co.uk](https://www.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

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

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

Dowgate Capital

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

E

EFG Private Bank Limited (Trading as 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	

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


G

Global Preservation Strategies	GPIIM Limited
Gore Browne Investment Management	

H

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

I

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

J

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

K

Killik & Co	KW Investment Management Ltd
-------------	------------------------------

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
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

Natwest Bank	Nucleus Wrap
--------------	--------------

O

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

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	Royal Bank of Scotland
Realm Investment Management Limited	Ruffer


S

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

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

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

V

Vermeer Investment Management Limited	Voyager Asset Management
Verso Investment Management LLP	

W

W1M Wealth Management Ltd	Wellian Investment Solutions
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



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

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
-------------	----------------------

E

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


F

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

G

Goldman Sachs International	
-----------------------------	--

H

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

J

J & E Davy	James Sharp & Co
------------	------------------

K

Keith Bayley Rogers	King & Shaxson
---------------------	----------------

L

LIFT-Invest	Lion Trust Investment Solutions
-------------	---------------------------------

* 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.

** 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
--------------------------------	---------

O

Oberon Investments Limited	Octopus Investments Ltd
----------------------------	-------------------------

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

* 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.


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

W1M Wealth Management Ltd	Womble Bond Dickinson Wealth 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.

** 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.

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 Trustees Limited (SLT) (registered in England, number 06341296), 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 (BPTL) (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 05802677), Temple Quay Pension Trustees Limited (TQPTL) (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, BPTL, SPST, CTL, MPTL, TQPTL, TPTL, CrTL have their registered office at Suite B & C, First Floor, Milford House, 43 55 Milford Street, Salisbury, SP1 2BP. SLPL, SLT, 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, SLPL, SLT, SLAL and SLAPC are members of a VAT group with VAT registration number 514 0358 80. 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. (12/25)

SL168.202601.2
January 2026

