CURTIS BANKS

FULL LIST OF INVESTMENT PARTNERS AND FIRMS

Including Heritage Products of Curtis Banks and Suffolk Life

2026

curtisbanks.co.uk

Full list of Investment Partners and firms

Below is a list of investment firms with whom Curtis Banks has a relationship - across the Your Future SIPP and our heritage products.

Investment Partners provide an integrated option by reporting data to us electronically, allowing us to pass on fee savings to you. These electronic data feeds update our systems automatically and can be viewed through our secure portal at curtisbanks.co.uk.

Where a firm is named but there is no Investment Partner status showing, this just means we have an established business relationship with this firm but no data integration in place.

Please note that the inclusion of any firm on this document does not represent an endorsement or recommendation.

You may choose any firm listed, although certain products have dedicated panels of Investment Partners. Where we're required to place transactions directly with an Investment Partner, standard transaction fees will apply. Please refer to your product's Schedule of Fees.

We can also deal with other investment firms that meet our due diligence requirements. If a firm does not meet the criteria to become an Investment Partner, additional fees may apply.

You are responsible for selecting an FCA regulated investment firm, as Curtis Banks cannot provide advice. Our panel is reviewed regularly, and we'll notify you if any changes to this list affect your plan.

Last updated 1 July 2026

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
A					
AB Investment Solutions Ltd trading as FD Dynamic Portfolio (Clearview)	✓	✓	✓	✓	✓
Aberdeen Standard Capital	✓	✓	✓		
Aegon (Cofunds Ltd)	✓	✓	✓		✓
AFH Independent Financial Services Limited	✓	✓	✓	✓	
AJ Bell (InvestCentre)	✓	✓	✓		
AJ Bell Dealing Account (previously called YouInvest)					
Albert E Sharp	✓	✓	✓		
Alfred Simmons Investment Management Ltd					
Alington Ruthin Stockbrokers and Investment Management Limited	✓		✓		
Alpha Portfolio Management	✓	✓	✓	✓	
Amber Financial Investments Limited	✓	✓	✓		
Andrews Gwynne LLP (Curtis Banks SIPP only)		✓			
Arbuthnot Latham & Co Limited	✓	✓	✓		
Artorius Wealth Management Limited	✓	✓	✓	✓	✓
Ascot Lloyd Investment Management Limited	✓	✓	✓		
Ashcourt Rowan					
Atomos Investments Limited	✓	✓	✓		
B					
Balkerne Asset Management	✓	✓	✓		
Bank Leumi (UK) plc					
Barclays Bank Plc	✓	✓	✓	✓	
Barclays Investment Solutions Limited	✓	✓	✓	✓	
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	✓	✓	✓		

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
C					
Callanish Capital Ltd	✓		✓	✓	
Canaccord Genuity Wealth Limited	✓	✓	✓	✓	
Capital Financial Markets Limited	✓	✓	✓	✓	✓
Casterbridge Wealth Ltd	✓	✓	✓		
Castlefield					
Cazenove Capital Management	✓	✓	✓	✓	
CG Wealth Planning Limited	✓	✓	✓		
Charles Stanley	✓	✓	✓	✓	
Church House Investments Limited	✓	✓	✓	✓	
City and Continental Ltd					
City Asset Management plc	✓	✓	✓	✓	
City of London Markets	✓		✓		
Connor Broadley Ltd	✓	✓	✓		
Coutts					
Credit Suisse (UK) Limited					
Credo Capital Limited	✓	✓	✓		
CS Managers Ltd	✓	✓	✓		
Cude Capital Limited	✓				
D					
Danske Bank					
Dart Capital Limited					
E					
Eighteen 48 Partners Limited*		✓	✓	✓	✓
ED&F Man Capital Markets Limited					
EFG Private Bank Limited (trading as EFG Harris Allday)	✓		✓		
Epoch Wealth Management Ltd		✓			
EQ Investors	✓	✓	✓	✓	✓
Evelyn Partners	✓	✓	✓	✓	

* 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	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	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)	✓	✓	✓		
Flagstone (Cash Platform)**		✓	✓		
Fundment					
Fusion Wealth Limited	✓	✓	✓		✓
G					
Global Preservation Strategies	✓	✓	✓		
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	✓		✓		
Intrinsic Capital London Limited	✓	✓	✓		
Invest N Grow	✓		✓		
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.
** Your Future SIPP - FULL SIPP only.

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
J					
J & E Davy					
J M Finn & Co	✓	✓	✓	✓	
James Brearley & Sons Limited	✓	✓	✓	✓	
James Hambro & Partners LLP	✓	✓	✓	✓	
James Sharp & Co					
K					
Keith Bayley Rogers					
Killik & Co	✓	✓	✓		
King & Shaxson					
KW Investment Management Ltd	✓	✓	✓	✓	✓
L					
Leodis Wealth	✓	✓	✓	✓	
LGT Vestra US	✓	✓	✓		
LGT Wealth Management US Limited	✓	✓	✓	✓	
LIFT-Invest		✓			✓
Lincoln Private Office Ltd	✓	✓	✓	✓	
Liontrust Investment Solutions Limited					
Lloyds Wealth Management Limited	✓		✓		
Lombard Odier	✓		✓	✓	✓
London Stone Securities	✓		✓		
Luna Investment Management	✓		✓		

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
M					
M&G Wealth Platform	✓	✓	✓	✓	✓
Manorbridge Investment Management	✓	✓	✓	✓	✓
Margetts Fund Management Ltd	✓	✓	✓		
Mattioli Woods Limited	✓	✓	✓		
Maunby Investment Management Ltd					
McInroy & Wood Limited	✓	✓	✓	✓	
Metis Asset Management	✓	✓	✓		
Millbank Investment Managers Limited					
Mirabaud Asset Management					
Morningstar Wealth Administration Limited					
Mountstone Partners Ltd	✓	✓	✓		
MPL Wealth Management Ltd	✓	✓	✓	✓	✓
Murray Asset Management UK Limited					
Myddleton Croft Investment Managers	✓	✓	✓		
N					
NatWest Bank	✓	✓	✓	✓	✓
Nedbank Private Wealth Limited					
Nucleus					
Nucleus Wrap	✓	✓	✓		
O					
Oakglen Wealth Limited	✓	✓	✓	✓	✓
OCM Wealth Management Ltd		✓			
Odey Wealth Management (UK) Limited	✓		✓		
Optiva Securities Limited	✓	✓	✓	✓	✓

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
P					
P1 Investment Management (discretionary business)					
P1 Platform (execution only business)					
Pairstech Capital Management LLP					
Parmenion Capital Partners LLP	✓	✓	✓		✓
Patronus Partners Ltd	✓		✓	✓	✓
PB Financial Planning Ltd					
Pembroke Asset Management LLP					
Pershing Securities Limited (please contact us to find out if any associated firms are acceptable)	✓	✓	✓		
Price Value Partners Ltd	✓		✓		
Progeny Asset Management Ltd	✓				
Prudential TIP (transaction fees will apply)	✓				
Psigma Investment Management Limited	✓	✓	✓	✓	
Ptarmigan Capital	✓	✓	✓	✓	✓
Q					
Quartet Investment Managers	✓	✓	✓		
Quilter Investment Platform Limited	✓	✓	✓		✓
Quilter Cheviot Limited	✓	✓	✓	✓	
R					
R C Brown Investment Management plc	✓	✓	✓		
Rathbone Investment Management Limited (including Rathbone Greenbank Investments)	✓	✓	✓	✓	✓
Ravenscroft Investments (UK) Limited					
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					
Royal Bank of Scotland	✓	✓	✓	✓	✓
Ruffer LLP	✓	✓	✓	✓	✓

Investment firm	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
S					
Saltus Partners LLP	✓		✓		
Saranac Partners Limited	✓		✓	✓	
Sarasin & Partners	✓		✓		
Savoy Investment Management					
Scottish Widows	✓	✓	✓		
Scottish Widows Platform (Firm only)					
Seven Investment Management LLP	✓	✓	✓	✓	✓
S I Capital	✓		✓		
Sorbus Partners LLP	✓		✓		
St James's Place Investment Management Limited T/A Rowan Dartington	✓	✓	✓	✓	
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 (restrictions and transaction fees will apply, please contact us)	✓		✓		
TAM Asset Management Limited	✓	✓	✓	✓	✓
Tatton Investment Management					
Tees Financial plc	✓		✓		
Telford Mann					
The Share Centre Ltd		✓			
Thesis Asset Management	✓	✓	✓	✓	
Thorntons Investment Management Limited	✓		✓		
TIML (Tacit Investment Management)	✓	✓	✓	✓	
Titan Private Wealth	✓	✓	✓		
Transact	✓	✓	✓		
Tribe Impact Capital	✓	✓	✓		
TrinityBridge Limited	✓	✓	✓	✓	✓
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	Your Future SIPP Partner	Curtis Banks Heritage products Partner	Suffolk Life Heritage products Partner	Sim Partner	Smart Partner
U					
UBS AG	✓	✓	✓		
UCAP Asset Management (UK) Ltd	✓	✓	✓	✓	✓
UK Bond Network	✓		✓		
UK Portfolio Management Ltd	✓	✓	✓		
Union Bancaire Privée, UBP SA					
Union Bancaire Privée (UK) Limited	✓	✓	✓	✓	
V					
Vermeer Investment Management Limited	✓	✓	✓	✓	
Verso Investment Management LLP	✓				
Vintage Asset Management		✓			
Voyager Wealth Management Limited	✓		✓	✓	
VWM Consulting Ltd		✓			
W					
W1M Asset Management Limited	✓				
W1M Wealth Management Ltd		✓	✓	✓	✓
Walker Cambria	✓	✓	✓		
Walker Crips Investment Management Limited	✓	✓	✓	✓	
Waverton Investment Management	✓	✓	✓	✓	
Wealthtime (Novia Financial Plc)	✓	✓	✓		
Wealthtime Classic (Wealthtime Limited)	✓	✓	✓		
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	✓	✓	✓		✓

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 Relay UK 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 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)

SL991.202609.4
September 2026