

CURTIS BANKS TAX YEAR END DEADLINES 2024-25

Date	Deadline	Notes
Tuesday 11 March	Last day for regular contributions with 1 April collection date	Applications must be fully completed with no outstanding or missing requirements.
Thursday 13 March	Last day for new drawdown requests for PCLS and income/UFPLS	Where cash is available for the PCLS payment. Where cash is not available or investments are held through investment managers or investment partners, we'll be reliant on third parties and can't be guaranteed. Valuation of property and non-standard investments may impact this deadline.
	Last day for regular and one-off income payments (cash to be available)	If disinvestments or return of funds are required, these will be reliant on third parties and must be considered in lead times.
Tuesday 1 April	Last day for new SIPP applications	Establishment can't be guaranteed unless all requirements are met. Applications must be fully completed with no outstanding or missing requirements.
Friday 4 April	Last day for single contributions	

Please note: deadlines quoted are for requests in full, where no further information is required.

If your client wants to take tax-free cash or income before tax year end and needs to disinvest assets to do so, please make sure you have checked the requirements and cut-off dates of all firms involved, paying particular attention to any transactions that require original documents.

"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 05802677), 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](https://www.nucleusfinancial.com). (12/24)