

PREFERRED PROVIDER LIST



- Royal London
- Old Mutual Wealth
- James Hay
- Aviva
- London & Colonial
- Transact
- Prudential
- Suffolk Life
- Scottish Widows
- A j Bell - Investcentre
- Canada Life
- Elevate
- Standard Life Wrap
- Curtis Banks
- Fidelity Fundsnetwork
- Liberty SIPP

We have already completed due diligence on these firms and have established a working relationship with them, which usually means they provide us with an efficient and quick service. This in turn means they are less likely to make mistakes, and your client's funds are settled quicker.

Whilst these firms are our preference, we do recognise some introducers will have their own preferences and we are happy to consider these, so long as they are suitable and match the client's objectives, ATR/ATIR and are ones we have either used before, and therefore already have been provided with due diligence on them, or you have supplied us with the due diligence you hold and we find acceptable. However, we will have the overall decision on where the transfer monies are placed as ultimately, the risk lies with us.

