



INTELLIGENTMONEY

The Intelligent SIPP

*Designed as a high value low cost SIPP
(or pension) wrapper for holding
investments on third party platforms*

The Intelligent SIPP

The Intelligent SIPP has no minimum investment requirement and is designed for advisers wanting to appoint a third party investment manager, or take responsibility themselves for running model portfolios on their selected investment platform.

There are no initial or transfer charges and the annual charge is a simple £150 during accumulation and £240 during decumulation. Additional charges, including time charging, are applied for other work, but only as and when you instruct us on this.

There will also be the fees and charges levied by your chosen platform provider and/or investment manager to be factored into any illustration.

The Intelligent SIPP also offers full SIPP functionality, should you require this, at our standard tariff rates.