



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 people who want their adviser to take full responsibility for running their pension portfolio themselves, either directly or through a third party investment manager.

There are no initial or transfer charges and the annual charge is a simple £150 whilst you are growing your pension fund and £240 when you start to withdraw income from it. Additional charges, including time charging, are applied for full SIPP functionality, but only if/when you request this.

You must also factor in the fees and charges levied by any third party platform provider and/or investment manager. Your adviser will give you full details about these.

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