

Talking Points

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Update on the Suffolk Life SmartSIPP

With over £160 billion in assets, platforms are playing an increasingly important role in the financial advice and planning process. SmartSIPP was launched to deliver high quality SIPP administration to you whilst allowing you to access the platform relevant to your specific client.

We've been busy making improvements and as of today SmartSIPP now offers integrated access to over 70% of the platform market as well as taking on other significant improvements too.

Fixed term deposit accounts

Earlier this year we introduced an interest floor to all our SIPP bank accounts, meaning that in today's low interest environment all investors will receive interest.

It is widely accepted that SIPP bank accounts are not investments, and your feedback was that you wanted more deposit choice that is available on the platforms.

In response we've made the fixed term deposits from the whole of the market available through SmartSIPP, transacted directly by Suffolk Life. Transaction fees will apply however there are no additional annual administration fees. For more information on please visit www.suffolklife.co.uk/fixedterm.

Welcome to Skandia and Transact

Over 80%* of advisers use more than one platform, and your feedback was very clear – add Skandia and Transact to complement the existing partners. We've done just that, and they are now integrated into SmartSIPP alongside Ascentric, Cofunds, Fidelity FundsNetwork, Raymond James and Seven IM. Stocktrade gives you and/or your client access to an execution-only broker should you need it.

A little more on the two new platforms...

Skandia Investment Solutions

Research places Skandia as the UK's largest platform by assets under administration*, with advisers liking the simplicity of their platform proposition and the client access experience.

Transact

Transact are one of the most established UK platforms with a proposition based on quality service that is important for an adviser and their business. Advisers are loyal and rate the team there as "excellent".*

A reminder of SmartSIPP attributes.

- High quality SIPP administration from Suffolk Life, supporting the platform of your choice.
- Capped and flexible drawdown, including transfers in.
- Ability to switch to bespoke MasterSIPP at any time without a scheme transfer.
- Direct 'off-platform' investments available direct through Suffolk Life.
- A certain future. A profitable business with one parent shareholder.

For more details on Suffolk Life, our SmartSIPP and partners visit www.smartsipp.co.uk/ssliterature

* Source: The adviser (plat)Forum Guide, November 2011

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