

## Press release

1<sup>st</sup> July 2015

### Talbot and Muir doubles number of DFM partners for Simple Retirement Account with 7 new additions

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**Talbot and Muir, the independent self invested personal pension (SIPP) and small self administered scheme (SSAS) specialist, has partnered with 7 further investment managers to double those able to provide access to their discretionary fund management (DFM) services for clients of the Talbot and Muir Simple Retirement Account (SRA).**

The new DFMs are Cazenove, Charles Stanley, European Wealth Management, Henderson Rowe, JM Finn, Smith and Williamson and Vestra. They join the 7 others currently on the SRA panel, Brewin Dolphin, Brooks Macdonald, Canaccord Genuity, Close Brothers, Investec, Quilter Cheviot and Rathbones.

Claire Trott, Head of Pensions Technical, Talbot and Muir, said: "Many advisers now work closely with their chosen DFM partner to provide the high service levels clients now demand and our SRA product is an ideal vehicle for pension fund monies to be invested in this manner. We initially started with 5 DFMs available to SRA clients but the demand to include others has been high and so we have now increased the number to 14 and will continue to look for additional, appropriate DFM partners."

The Talbot and Muir SRA is a low cost DFM only SIPP that now offers access to any 1 of 14 DFM partners and a default bank account with Metro Bank. All this is available with one application form, no set-up fees and an annual administration fee of just £250 plus VAT. Advisers also have a named administrator that they deal with rather than a call centre approach.

Claire added: "We have close working relationships with advisers and listen to their needs, the 14 DFM partners on the SRA panel have been carefully selected based on conversations with advisers who welcome this low cost SIPP option that offers full bespoke SIPP service for their clients who only need a DFM."

Carl Lamb, Managing Director, Almary Green agrees: "Being able to use my preferred DFMs within a lower cost product without the loss of personal service makes a big difference to us and our clients. The addition of new partners to Talbot and Muir's Simple Retirement Account will only increase the number of clients that can benefit from this."

For further information on Talbot and Muir please visit the website at <http://www.talbotmuir.co.uk>

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## Contacts

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## Notes to Editors:

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Formed in 1993 initially as a specialist SSAS provider, Talbot and Muir are a high quality independent provider of SIPP and SSAS products distributed via Financial Advisers. Talbot and Muir entered the SIPP market in 2000 in response to a growing need for tailored solutions for their clients who wanted something other than “insurance company mentality”. The aim is to provide a personal and professional service to all advisers and their clients, with access to all levels in the business from named administrators to the principals of the company.

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