



Adviser Q&A

What has been announced today?

Talbot and Muir has been acquired by the Curtis Banks Group, subject to regulatory approval.

Why have you taken the decision to sell the business?

Having founded the business in 1993, Graham Muir and Brian Talbot have continued to pride themselves on our high levels of service and technical support. To continue to grow and develop the business we felt the time was right to look for a partner that was a strategic fit and has the same values as we do.

We considered a number of strategic opportunities and it became clear that Curtis Banks offered the ideal combination of safeguarding and providing opportunities for our valued staff, whilst retaining our Nottingham and Leeds presence and product range.

Will there be changes to your products, fees and charges?

There are no plans for changes to our products, fees or charges. We look forward to delivering improvements over time but for now, the business, brand and products continue as they are, without significant changes.

Will there be any changes to your IT system?

Curtis Banks is currently part-way through delivery of its system strategy that will see SIPP administration architecture upgraded and harmonised across the Group. In time these benefits will extend to Talbot and Muir, although the intention is for us to continue to trade independently post-acquisition as a subsidiary of the Group, maintaining our own brand, products, dedicated staff and distribution network.

Will my normal Business Development Consultant change?

You will continue to work with us as you have always done, there will be no changes to the business development consultants, the administrators or other staff at Talbot and Muir.

Will you be closing either of your offices?

There are no plans to close or relocate, both the Nottingham and Leeds offices will remain.

Will there be any management changes?

It has always been Brian Talbot's intention to retire in the summer of this year and that is still the case.

What about the other Directors?

Graham Muir and David Bonneywell will help effect an orderly transfer of the business into the Curtis Banks Group, ensuring that everything runs smoothly for advisers and their clients. Thereafter, David Bonneywell and Paul Darvill will remain within the organisation and be key members of the team, driving the Talbot and Muir business forward. Graham Muir will remain within the business for six months following completion of the transaction.

Will I continue to receive the same Talbot and Muir service?

As a business we pride ourselves on supporting each and every adviser that works with us. We will continue to work with you in exactly the same way as previously and our administration and technical support will not change.

How many self invested products do you have?

We currently administer over 7,000 pensions with assets under administration of circa £3.4bn.

How many staff do you have?

We currently have 75 members of staff.

How can I find out any additional information?

If you have any questions or concerns, please don't hesitate to call your normal Talbot and Muir contact, Brian Talbot, Graham Muir or David Bonneywell.

talbotandmuir

55 Maid Marian Way

Nottingham

NG1 6GE

Telephone 0115 841 5000

Facsimile 0115 841 5027

www.talbotmuir.co.uk

Talbot and Muir Limited provides administration to Small Self Administered Pension Schemes and is authorised by and regulated by the Financial Conduct Authority to provide administration to Self Invested Personal Pensions.

Talbot and Muir is the trading name for Talbot and Muir Limited (company number 02869547), registered in England, registered address 55 Maid Marian Way, Nottingham, NG1 6GE. A list of directors is available upon request.