



## **The Online Facility Offered by IPM for Clients**

IPM is pleased to be able to offer online access to our clients, allowing clients to view details of the accounts held within their SIPP with Bank of Scotland online.

The accounts that can be viewed via this facility are the trustee bank account, unique to each individual SIPP, or, where a client is a member of a group property purchase, the group account. As mentioned above only the accounts held with Bank of Scotland can be viewed using this facility as opposed to any other deposit accounts a client may hold within their SIPP.

This facility allows clients to view all transactions in their bank accounts over the last eighteen months. Clients are able to specify a time period to view transactions and this information can then be exported into Excel, Adobe or Word before either printing or saving locally.

The online facility cannot be used to give IPM investment instructions or move money. Any requests of this nature should continue to be made in the normal way. IPM's long standing belief is that the SIPP has two distinct functions; pension administration and investment management. This facility is designed to attend to the pension administration element of the SIPP. Any online arrangements you have in place in respect of the investment management can run alongside the IPM offering.

To apply for access to this facility please log onto [www.ipm-pensions.co.uk](http://www.ipm-pensions.co.uk) and follow the on screen instructions in the 'Online Access' section.

By allowing access to this information at your convenience we hope this further enhances the service IPM offers to our clients. Any queries you have regarding the online facility can be directed to James Randall, Jonathan Lochery or Ashley Mardle on 0845 130 3443 or via [info@ipm-pensions.co.uk](mailto:info@ipm-pensions.co.uk)

I.P.M. SIPP Administration Limited is authorised and regulated by the Financial Conduct Authority (FCA) to provide self invested personal pensions only. IPM cannot provide financial advice. IPM strongly recommends that all clients speak with an independent financial adviser before making any decisions in regards to their pension provision.

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