



The Online Facility Offered by IPM for Financial Advisers

IPM are pleased to offer an online access facility for our advisers designed to provide you with the day to day information required to efficiently manage your clients' SIPPs.

After receiving feedback from our introducers the online facility has been designed with the aim of providing information to our advisers where historically it has been necessary to contact IPM. The idea is that our advisers will be able to access a wealth of information in respect of each client you have introduced to IPM at the touch of a button. The information provided on the online facility includes:

- full transaction history of the trustee Bank of Scotland account over the last eighteen months
- full contribution history and pension input period information
- details of transfers received on behalf of your client
- history of valuations undertaken by IPM on your client's behalf
- details of any income being paid from the SIPP
- confirmation of the appointed investment advisor and investment administrator

This information can be viewed online, printed and downloaded into Word, Excel, Adobe or HTML so that you are able to present this to your clients.

The online facility cannot be used to make investments on behalf of your clients or provide investment instructions to IPM. These 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 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 and follow the on screen instructions in the 'Online Access' section.

By allowing you access to this information at your convenience we hope this further enhances the service IPM offers to our introducers and your 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