

# simplySIPP

**SimplySIPP** is a great value SIPP if you don't immediately need the full investment options offered by the 'full' Xafinity SIPP, but you still want the control that 'whole of market' investment choice brings. Costs are kept low with up to two investment accounts – and this isn't as limiting as it might sound. With just a single investment account, **SimplySIPP** can access thousands of investments through a Discretionary Fund Manager / WRAP / Platform / Fund Supermarket account. Adding a second investment account allows you to access other funds and investments in the same way, plus gives you the freedom to take two different investment strategies should you so wish.

## At a glance

- Up to two investment accounts per SIPP - whole of market choice
  - Discretionary Fund Manager accounts
  - Platforms, WRAPs, Fund Supermarket accounts
  - Deposit accounts
  - Structured products (subject to review)
  - Managed funds (including investment trusts, unit trusts and OEICs)
- No minimum fund value
- Free, simple "promotion" to the Xafinity SIPP if more / additional investments are needed
- Comprehensive retirement options available including
  - Flexi-access drawdown
  - Uncrystallised funds pension lump sum
  - Online valuations available to members and financial advisers

## SimplySIPP fee summary

- Set up fee of £150\*, including all transfers-in & contributions
  - Fixed fee of £250 p.a.\* / £299 p.a.\* (one/two investment accounts)
  - Annual fees charged monthly
  - Investment account sale: £122\*
  - Changing between one and two investment accounts: £57\*
  - Pension Commencement Lump sum payment and drawdown set up fee: £143\*
  - Annual drawdown fee: £156\*
- (\* VAT payable in addition on all fees)



Find out more information at:  
[www.xafinitySIPP.com](http://www.xafinitySIPP.com)

Xafinity SIPP Services Limited is authorised and regulated by the Financial Conduct Authority. Our FCA Registration Number is 461791. You can check this on the FCA's website at [www.fca.org.uk/register](http://www.fca.org.uk/register). Registered Offices. Xafinity SIPP Services Limited (SC069096) is registered in Scotland at Scotia House, Castle Business Park, Stirling, FK9 4TZ. Xafinity Pension Trustees Limited (01450089) is registered in England & Wales at Phoenix House, 1 Station Hill, Reading, RG1 1NB. Part of the Xafinity Consulting Group. 053XSS (08/18)