

xafinitySIPP

The Xafinity SIPP is a “full” SIPP product aimed at more sophisticated investors who wish to maximise investment choice through all acceptable investment types. With full investment flexibility, the Xafinity SIPP also supports commercial property investment (one of our specialist areas), unlisted shares and other investment types.

At a glance

- Unlimited number of investment types/products can be held
- Investments in funds: choose from the whole of market including Platforms, WRAPs, Fund Supermarkets, managed funds, investment trusts, unit trusts and OEICs
- Commercial property & land investments
- Unlisted company share purchases: up to 70% of your SIPP could be invested, subject to technical review
- UCIS investments accepted, subject to technical review
- Joint / family SIPPs available with shared fees for jointly owned assets
- Comprehensive retirement options available, including uncrystallised funds pension lump sum and flexi-access drawdown
- Online valuations available to members and financial advisers



Xafinity SIPP fee summary

- £0 SIPP set up fee and no fees for contributions (except in specie payments)
- Annual fee of 0.24% of SIPP assets held subject to minimum of £192p.a.+VAT and maximum of £640p.a.+VAT
- £65+VAT per transfer-in
- Additional fees for purchase and sale of investments depending on investments types. Only pay for the investments you hold.
- No additional fees for VAT administration & borrowing administration on property/land
- Pension Commencement Lump Sum payment and drawdown set up fee of £143+VAT and an annual drawdown fee of £156+VAT
- Exit fee applies only if you transfer all assets out of the Xafinity SIPP: £485+VAT



Find out more information at:

www.xafinitysipp.com

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