

RETIREMENT WEALTH ACCOUNT

DISCRETIONARY FUND MANAGER LIST

Approved DFM^s*

Atomos Investments Ltd

Brooks Macdonald Asset Management Ltd

Canaccord Genuity Wealth Limited

Cazenove Capital

Evelyn Partners Discretionary Investment Management Ltd

Evelyn Partners Investment Management LLP

Evelyn Partners Investment Management Services Ltd

JM Finn & Co Ltd

LGT Wealth Management UK LLP

Parmenion Capital Partners LLP

Quilter Cheviot Ltd

Rathbones Investment Management Ltd

Raymond James Wealth Management Ltd – Trading as Charles Stanley

RBC Brewin Dolphin

Rowan Dartington & Co Ltd

Saltus Partners LLP

Titan Private Wealth Ltd

TrinityBridge

*Correct as at 25 July 2025

CONTACT US

If you would like more information about your plan, please:

Email us at

IODMRelationships@thephoenixgroup.com

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