PHOENIX WEALTH

RETIREMENT WEALTH ACCOUNT

DISCRETIONARY FUND MANAGER LIST

Approved DFMs*

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

Saltus Partners LLP

St James's Place Investment Management Ltd – trading as Rowan Dartington

Titan Private Wealth Ltd

TrinityBridge

*Correct as at 14 August 2026

CONTACT US

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

Email us at

IODMRelationships@thephoenixgroup.com

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