

Electronic Transfer Counterparties

We are able to process electronic transfers where the ceding provider is part of the ATG (Altus Transfer Gateway) system. We can process them to Pensions when the ceding party is part of the Origo system.

This document provides lists of these providers. The names are also listed on the platform transfer interface, and that list may be, on occasion, updated more frequently as new vendors access these systems.

The lists in this document should be taken as a guide and assist in deciding when to provide transfer forms to clients in advance to avoid the risk of having to re-contact them once accounts are already open.

Some businesses operate a range of similarly named agencies so take care to check the provider and if in any doubt contact the Platform Operations team to check for eligible providers.

ISA and GIA electronic transfer counterparties.

Provider Name	GIA	ISA
AJ Bell	Y	Y
Advance by Embark	Y	Y
Aegon Inv Sol Ltd/Scot Eq Plc	Y	Y
Aegon UK Cofunds Ltd	Y	Y
Aviva Investors UK Fund Services Limited	Y	Y
Aviva Pension UK Ltd / Wrap UK Ltd	Y	Y
Barclays Direct Investing Nominees Limited	Y	Y
Charles Stanley & Co Limited	Y	Y
Standard Life, Elevate	Y	Y
Embark Investment Services Limited	Y	Y
Equiniti Financial Services Limited	Y	Y

Fidelity Investments	Y	Y
Freetrade	C	Y
Fundment Limited	Y	Y
Hargreaves Lansdown	Y	Y
Hubwise Securities	Y	Y
Interactive Investor Services Ltd	Y	Y
Ascentric (Investment Funds Direct Limited)	Y	Y
Janus Henderson	Y	Y
Jupiter	Y	Y
M&G Investments	Y	Y
Novia Financial Plc	Y	Y
Nucleus Financial Group Limited	Y	Y
Nutmeg Saving & Investment Limited	Y	Y
Parmenion Capital Partners LLP	Y	Y
Quilter	Y	Y
Seven Investment Management LLP	Y	Y
Standard Life Wrap (FundZone)	Y	Y
Transact (Integrated Financial Arrangements Ltd)	Y	Y
True Potential	C	C
Vanguard	Y	Y

C = Cash only (no In-specie possible)

Pension electronic transfer counterparties

Provider Name	Cash	In-specie
7IM SIPP	Y	N
@SIPP Ltd	Y	N
AJ Bell Investcentre	Y	N
AJ Bell Platinum SIPP	Y	N
AJ Bell Securities Ltd	Y	N
AJ Bell Youinvest	Y	N
AON Delegated DC	Y	N
AXA Life Europe	Y	N
Advance by Embark Platform	Y	N
Aegon Packaged	Y	N
Aegon Platform (Aegon Retirement Choices, Retiready, and One Retirement)	Y	N
Aegon Retail (Aegon SIPP only)	Y	N
Aegon TargetPlan (Ex-BlackRock)	Y	N
Aegon/Cofunds Limited	Y	Y
Ashcroft SIPP (GRSL)	Y	N
Astute Trustee Services Ltd - Saltus SIPP	Y	N
Atlas Master Trust	Y	N
Avalon (Embark Group)	Y	N
Aviva Pension UK Ltd/Wrap UK Ltd	Y	Y
B&CE Financial Services Ltd	Y	N
Barclays SIPP	Y	N

Barnett Waddingham SIPP	Y	N
Bigblue Touch	Y	N
Bright Square Pensions Limited (SEI)	Y	N
Canada Life International Ltd	Y	N
Carey Pensions UK	Y	N
Charles Stanley & Co Limited	Y	Y
Clerical Medical	Y	N
Close Asset Management Limited	Y	N
Cofunds Pension Account Only	Y	N
Countrywide Assured	Y	N
Courtiers Investment Services Ltd	Y	N
Coutts & Co (Embark Group)	Y	N
Curtis Banks	Y	N
DP Pensions Ltd	Y	N
Dentons Pension Management Ltd	Y	N
EBS (Embark Group)	Y	N
Elevate Part of Standard Life	Y	N
Embark Pensions (Ex-Hornbuckle)	Y	N
Embark Platform (Embark Group)	Y	N
Fidelity International	Y	Y
Fidelity SIPP	Y	N
Forester Life	Y	N
Freetrade Limited	Y	N

Fundment Limited	Y	Y
Fundment Pension	Y	N
GRSL Tesla SIPP	Y	N
HS Admin	Y	N
Halifax Share Dealing SIPP	Y	N
Hargreaves Lansdown	Y	Y
Hargreaves Lansdown Asset Management Ltd	Y	N
Hubwise Hartley SIPP	Y	N
Intelligent Money	Y	N
InvestAcc	Y	N
Investec Wealth & Investment SIPP	Y	N
Investment Funds Direct Ltd (Ascentric)	Y	Y
JLT Premier Pensions	Y	N
James Hay Partnership	Y	N
Killik & Co	Y	N
LV=	Y	N
Legal & General	Y	N
MetLife	Y	N
Moneybox Personal Pension (GRSL)	Y	N
Moneyfarm (Embark Group)	Y	N
Morgan Lloyd	Y	N
NFU Mutual	Y	N
National Employment Savings Trust	Y	N

National Pension Trust	Y	N
Natwest	Y	N
Novia	Y	N
Novia Financial	Y	Y
Novia International SIPP	Y	N
Nucleus	Y	Y
Nutmeg (Embark Group)	Y	N
Parmenion Capital Partners	Y	N
Penfold	Y	N
PensionBee	Y	N
Phoenix (Ex-Century/NEL)	Y	N
Phoenix (Ex-Scottish Provident, ExScottish Mutual, and Ex-BA)	Y	N
Phoenix (Ex-Pearl, LLife, NPI/Swiss/Alba Corp)	Y	N
Phoenix Life (Ex-Abbey)	Y	N
Phoenix Wealth	Y	N
Praemium	Y	N
Prudential	Y	N
Quilter	Y	Y
RBS	Y	N
ReAssure	Y	N
ReAssure (SIPPS)	Y	N
ReAssure (Ex-Barclays Life)	Y	N
ReAssure Life Ltd	Y	N

Rowanmoor (Embark Group) Y N	Y	N
Royal London Y N	Y	N
Royal London (Ex-Co-operative Financial Services)	Y	N
Royal London (Ex-Scottish Life) Y N	Y	N
Royal London - Glasgow Y N	Y	N
Sanlam Investments and Pensions Y N	Y	N
Scottish Friendly (Ex-Mobius) Y N	Y	N
Scottish Friendly Assurance Society Ltd	Y	N
Scottish Widows Y N	Y	N
Seven Investment Management LLP (Service Provider)	Y	Y
Smart Pension Y N	Y	N
Sovereign Pension Services Y N	Y	N
St. James's Place Wealth Management Y N	Y	N
Standard Life Y N	Y	N
Suffolk Life Y N	Y	N
Sun Life Financial of Canada Y N	Y	N
Talbot and Muir Y N	Y	N
The AON MasterTrust Y N	Y	N
The GRSL SIPP Y N	Y	N
Transact Y Y	Y	Y
True Potential Investments Y N	Y	N
Vanguard Y N	Y	N
Vitality Invest	Y	N

Wealth at Work Limited Y N	Y	N
Wealthsimple (Embark Group) Y N	Y	N
Wealthtime Y N	Y	N
Wesleyan Assurance Society and Subsidiary Companies	Y	N
Westerby Trustee Services Limited Y N	Y	N
Willis Owen (Embark Group) Y N	Y	N
XPS Self Invested Pensions Y N	Y	N
Yorsipp Limited Y N	Y	N
Zurich Assurance Limited (Ex-Allied Dunbar)	Y	N
Zurich Assurance Limited (Ex-Eagle Star)	Y	N
Zurich SIPP (CB) Y N	Y	N
iPensions Group Y N	Y	N
ii SIPP (Interactive Investor)	Y	N