

Proactive
Tailored
Consistent
Helpful
Valuable
Trustworthy
Efficient
Comprehensive
Polite
Reliable
Brilliant
Consistent
Understanding
Trustworthy
Experienced
Knowledgeable
Polite Great values

“ WHAT PEOPLE SAY ABOUT OUR SSAS AND SIPP SERVICES ”

Polite Understanding
Great values
Helpful
Brilliant
Tailored
Reliable
Knowledgeable
Efficient
Proactive
Integrity
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Our Self Invested Pensions services

People are taking more of an interest in the investment of their pension monies and we have pension vehicles that cater to that demand, by offering a personal service on top of professional pension administration. Investment flexibility in SIPP and SSAS is more popular than ever before, but not only are people taking more of an interest in the investment of their pension monies, they want a personal service on top of professional pension administration.

SIPP

Our Self Invested Personal Pension (SIPP) allows individual investors to access a huge range of investments including direct investment into commercial property and accounts with many Discretionary Fund Managers.

The combined value of assets held within SIPPs we help administer is estimated at **£1.2 billion**, with an average SIPP fund size of **£400,000**, though, we have a range of smaller and much larger individual schemes.

Within our SIPP portfolio we hold over **1,000** properties.

£1.2bn
SIPP

average size
£400k



1,000

Properties

SSAS

Our Small Self-Administered Scheme (SSAS) allows business owners to lend back half of their pension savings to their business on top of the investment options available to our SIPP investors.

The combined value of assets held within SSASs that we help administer is estimated at **£4.1 billion**, with an average SSAS fund size of **£1.7 million** though, we have a range of smaller and much larger individual schemes. Within our SSAS portfolio we hold over **2,000** properties and over **750** loanbacks.

Barnett Waddingham's SSAS growth has come primarily from personal recommendations from existing clients and accountants, and increasingly from regulated advisers. As such, we are providing more adviser-friendly communications and service.

£4.1bn
SSAS

average size
£1.7m



2,000

Properties



750

Loanbacks

What people who use our SSAS and SIPP services say

“Staff are more than helpful, polite and they get important matters attended to quickly and efficiently”

“In the last 6 months I have activated my pension and made various changes to my SIPP investment managers and throughout the process Barnett Waddingham have been easy to deal with”

“They are excellent at what they do and are trustworthy and reliable”

“I trust Barnett Waddingham and they are an easy organisation to contact”

“Very good corporate culture and values”

“The service is very good and your responses are tailored to the needs and knowledge of the different members of the SSAS”

“The hands on approach by staff in my experience, answering or finding out the answer swiftly proactively and comprehensively”

“I am very pleased with my personal contact there. What is good is the continuity of same relationship manager over last few years so one develops that confidence that he somehow understands yours and your family needs”

“Barnett Waddingham has consistently provided brilliant advice regarding my pension”


“I have a close working relationship and would recommend the company to any client whose circumstances and objectives are appropriate for the company’s service”

“The company has integrity and are there for the long-term”

“As a SIPP client Barnett Waddingham is a straight forward, efficient service provider delivering jolly good value for money”

“Why would I not recommend them? They are brilliant”

For further information on the services provide
please contact us via the following:

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 sipp@barnett-waddingham.co.uk

 www.barnett-waddingham.co.uk/self-invested-pensions

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