

UK SIPP Account Transfers

There are over one million UK ex-pats living in Australia, most of whom will have invested towards their retirement through a pension fund or similar, before moving abroad.

Despite this significant number, there are less than 100 advisers nationally who specialise in this area of financial advice.

Due to differences in pension release laws between Australia and the UK, Australian-based advisers are generally unable to easily manage UK pension monies prior to their client reaching age 55. As a result, these monies are often excluded from a client's overall wealth strategy.

The Mason Stevens Solution

Mason Stevens has partnered with a UK-based company who offer a SIPP (Self-Invested Personal Pension) solution to provide advisers access to these funds via a retail platform.

Our solution ensures that for the period the client's funds must remain in the UK, they can be managed and reported in line with your client's overall investment and wealth strategy.

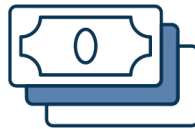
What is a SIPP?

A SIPP, or Self-Invested Personal Pension, can be thought of like an Australian retail super fund, providing the opportunity for individuals to choose how their pension monies are invested, but with greater flexibility than a traditional UK personal pension account.

Why make the move?



Holistic alignment of investment strategies



Manage currency risk via our platform's multicurrency capability



Full portfolio visibility, all in the one place

What is the process?

1. Our UK partner arranges the transfer of your client's funds to their SIPP and holds them on trust in a UK-domiciled account.
2. Your funds are then made available to you via the Mason Stevens Global Investment Service.
3. You can then manage the funds on behalf of your client via the platform, just as if they had an Australian retail super fund. The funds can continue to be held in GBP currency or investments, or moved to AUD depending on the client's best interest.

Your clients can access the Mason Stevens Global investment Service at any time to view their SIPP account in real time to see portfolio valuation, track performance and gain a clear picture of their current overall wealth.

To learn more about UK SIPP Account Transfers contact your relationship manager.



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