

Investment partner

Company profile

Parmenion is more than a platform or a wrap – it is a key partner for advisory firms wishing to grow their businesses.

Many in the Parmenion team come from an adviser background. We have come to understand the processes which not only make a financial advisory business far more satisfying to manage but, most importantly, provide services which clients are happy to pay for and which add real value to the business itself.

We believe that every client counts. By combining investment expertise with a technologically advanced platform and market knowledge, we enable advisers to profitably offer investment solutions to every client, from the smallest to the largest, freeing advisers to build their funds under management and maximise their fee based revenues.

More than just a service supplier we are a partner, our technology and processes allow us to construct solutions unique to each firm's own particular requirements with full support for both advisers and management.

About us

Parmenion is an independent and privately owned company founded in 2006. We are backed by some of the most experienced investment and technology executives in the industry.

We do not take on clients directly or meet with clients ourselves, but only offer investment and administration solutions through professional wealth management and financial planning firms.

Like an adviser, we are authorised and regulated by the Financial Services Authority. We act as a global custodian for clients' assets, we supply a diverse selection of tax efficient portfolio wrappers, we enable the delivery of online capabilities and the ongoing investment management of these assets, as well as reporting both in paper format and electronically.

Why select Parmenion?

Our platform has a unique facility which you can use to build your own client investment proposition

- An opportunity to gather all client assets; even smaller investment business with a minimum portfolio size of £7,000.
- A professional client investment service.
- Reduced compliance burden.
- A standardised investment process, so less time and money is spent on explanation, justification, administration and research.

- No time wasted on fee collection – we do that for you.
- A complete understanding for your client of their investment strategy.
- More time for an IFA to concentrate on the 'bigger picture'.
- 24/7 access to every client's portfolio, fund data and commission records.

Fund charges and investment terms

	Parmenion charges	Maximum client charges	Maximum adviser commission
Platform transaction commission	0.30%	1.50%	1.20%
Initial transaction commission	0.25%	3.25%	3.00%
Purchase dealing	0.90%	0.90%	0.00%
Discretionary management fee (pa)	0.30% + VAT	0.30% + VAT	Nil

SIPP remuneration

Adviser remuneration will be paid out of your SIPP cash account by Sippcentre. In addition your adviser may receive initial and renewal commission from Parmenion. Your adviser will provide you with further details.

Sippcentre will not accept investment instructions, these must be arranged directly with Parmenion.

Your adviser is responsible for transferring cash between Sippcentre and Parmenion. Your adviser must transfer cash using Sippcentre's online cash movement facility.

Contact details

Sales

Mark Bonehill, Sales Director, Parmenion
 Mobile 07912 612 691
 Email mark.bonehill@parmenion.co.uk

Investments

Simon Brett, Head of Investments, Parmenion Fund Research
 Office 01225 731 385
 Mobile 07875 572 165
 Email simon.brett@parmenion.co.uk

General

operations@parmenion.co.uk
 www.parmenion.co.uk
 0845 519 0100

Parmenion Capital Partners LLP is authorised and regulated by the Financial Services Authority. Parmenion Capital Partners LLP: Registered in England OC322243. Head office: The Tramshed, Beehive Yard, Walcot Street, Bath BA1 5BB. Registered Office: Portwall Place, Portwall Lane, Bristol BS1 6NA.

Information in this document is provided by the Investment Partner. Sippcentre cannot be held responsible for any statements made.

A J Bell includes A J Bell Holdings Limited and its wholly owned subsidiaries A J Bell Management Limited, A J Bell Limited and A J Bell Securities Limited.

A J Bell Management Limited is authorised and regulated by the Financial Services Authority and is the scheme administrator of all A J Bell's Self Invested Personal Pensions (SIPPs). A J Bell Securities Limited is a member of the London Stock Exchange and is authorised and regulated by the Financial Services Authority. It is the plan manager for all of A J Bell's Individual Savings Accounts (ISAs) and provides A J Bell's Dealing Accounts.

Sippdeal, Sippdealxtra and Sippcentre are platforms provided by A J Bell Management Limited. A J Bell Platinum SIPP is provided by A J Bell Management Limited. A J Bell Platinum SSAS is provided by A J Bell Limited.

The companies listed in the adjacent table are all registered in England and Wales at Trafford House, Chester Road, Manchester M32 0RS.

Company	Company Number	VAT Number
A J Bell Holdings Limited	4503206	833 5478 13
A J Bell Management Limited	3948391	759 3531 03
A J Bell Limited	3091664	639 0316 44
A J Bell Securities Limited	2723420	918 4226 21