

Section 32 – Transfer pension portfolio

Sanlam helps financial advisers find the best retirement solutions for clients through Section 32 transfers, SIPP's and tax allowances.

The pensions landscape has changed dramatically over the past decade, or so and the introduction of new rules and regulations has caused complications for some legacy pension arrangements, leading many people to rethink their retirement planning. We have the technical expertise to solve the various financial challenges this may bring.

Why work with Sanlam?

- Our TPP provides full access to Sanlam's investment expertise and research across a universe of traditional and alternative asset classes, such as commercial property and arable agricultural land.
- Uniquely, Sanlam can connect the TPP and self-invested personal pension (SIPP) values for commercial property purchases..
- A wide range of investments are available, including securities (via DFM only for new business), collective investment schemes, ETFs and commercial property. Full details can be found in the permitted investments information.
- Bespoke discretionary fund management is available through this product. Details of our listed DFMs are available upon request
- Your clients can choose to manage their own portfolios with expert help and guidance from our investment and advisory management teams.
- We provide your clients with innovative ways to manage their money, and we are one of just a handful of firms offering this speciality pensions transfer service.
- As far as we are aware, we are the only provider to offer access to such a broad range of investment options as part of the product.

Sanlam technical support

We offer a range of resources to help advisers through any technical or compliance issues:

- Our technical team is able to provide support and guidance with HMRC rules, for both individual, group and corporate plans.
- We are always looking for new ways to support advisers and their clients and our approach is a cost-effective and efficient way to meet a real need.
- Our bespoke, multi-faceted approach to retirement planning brings together a range of skills and expertise from across our firm.
- We have an ongoing strategy of working closely with external advisers to offer great flexibility and reduced administration for you and your clients.