

PRICING LIST

REPLACEMENT BUSINESS

Pension Review	£325 + VAT
Investment Review	£325 + VAT
New Drawdown Plan	£325 + VAT
Drawdown Existing Plan	£260 + VAT
Protection Review	£325 + VAT
Group Pension Switch	£350 + VAT
Group Life Switch	£350 + VAT
Platform Re-registration	£175 + VAT

NEW BUSINESS

New Pension	£200 + VAT
New Investment	£200 + VAT
Annuity	£165 + VAT
EIS/VCT/BR	£250 + VAT
Mortgage	£150 + VAT
Protection	£200 + VAT
Equity Release	£275 + VAT
Group Pension	£220 + VAT
Group Life	£220 + VAT

ANNUAL BUSINESS

Annual Review	£150 + VAT
Drawdown Review	£175 + VAT
Top Up	£150 + VAT
Fund Switch	£175 + VAT
Bed & ISA	£150 + VAT

FINANCIAL PLANNING REPORTS

Full Financial Plan (from)	£500 + VAT
Financial Planning Options Report	£350 + VAT
Retirement Options Report	£250 + VAT
Insistent Client Reports	£275 + VAT

DEFINED BENEFITS

Transfer Report	£525 + VAT
Non-Transfer Report	£400 + VAT
Abridged Advice	£275 + VAT
TVC	£175 + VAT
Additional Schemes	£165 + VAT
DB Data Gathering	£165 + VAT

ADDITIONAL CHARGES

FIXED COSTS

Additional person	£140 + VAT*
Additional advice area	£140 + VAT*
Additional strategy	£140 + VAT*
Template surcharge	£100 + VAT
Compliance surcharge	£100 + VAT
Per additional ceding scheme	£55 + VAT
Workplace pension analysis	£60 + VAT

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EXTRAS

HOURLY CHARGE

General administration	£35 + VAT
Additional data gathering	£35 + VAT
LOA chasing	£35 + VAT
Application forms	£35 + VAT
Ad hoc paraplanning	£55 + VAT
Research/analysis	£55 + VAT
Change to advice	£55 + VAT
Tax calculations	£85 + VAT
Cashflow	£85 + VAT
Specialist work	£100 + VAT
DB data gathering	£165 + VAT
Replacement business forms	£55 + VAT
ART profiling	£55 + VAT
Back-office system management	£35 + VAT
Client meeting prep	£55 + VAT
Client valuations	£35 + VAT

*Discounts are available where two pieces of advice, two different strategies or two people are included in one report.

Our costs cover up to two plans, with additional schemes being charged as above.

We also complete ad-hoc project and bulk work for both paraplanning and file checking. Get in touch to talk through your requirements and explore where we can add the most value.

FILE CHECKS

Annual Suitability Review	£75 + VAT
Buy to Let Mortgage	£75 + VAT
Mortgage	£75 + VAT
Protection	£75 + VAT
New Investment/Pension	£75 + VAT
Equity Release	£95 + VAT
Mortgage & Protection	£95 + VAT
At Retirement	£125 + VAT
Abridged	£125 + VAT
Pension Switch (Personal)	£125 + VAT
Replacement Investment	£125 + VAT
EIS/VCT Investment Schemes	£180 + VAT
Other	£180 + VAT
Equity Release (Home Reversion)	£180 + VAT
Pension Transfer (Occupational)	£295 + VAT

ADDITIONAL CHARGES

FIXED COSTS

Per additional protection scheme	£20 + VAT
Per additional scheme	£40 + VAT

HOURLY RATE

Administrative work (e.g. uploading case files)	£35 + VAT
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