



Outsource Your Paraplanning Fee Schedule

Pension Transfers	Fee
Pension Consolidation Report (up to 2 plans)	£200
<i>Each additional plan</i>	£50
Final Salary TVC / APTA (per scheme)	£75
Final Salary Recommendation Report (1 scheme)	£250
<i>Each additional scheme</i>	£75

Retirement Options	Fee
Drawdown	£200
Annuity	£150

Pension Contribution / Review	Fee
Pension Contribution Report	£150
Annual Review (pre-crystallisation)	£50
Annual Review (Drawdown)	£75

Investment Transfers	Fee
Investment Consolidation (up to 2 plans)	£200
<i>Each additional plan</i>	£50

Investment Contribution / Review	Fee
Investment Contribution Report	£150
Annual Review	£50

Protection	Fee
Protection Report (<i>single product</i>)	£150
<i>Each additional product</i>	£50

Inheritance Tax Planning	Fee
IHT Report - Basic	£150

Cashflow	Fee
Cashflow Calculation	£50
Cashflow Report – Basic (including calculation)	£150

Invoices are issued on the last working day of the month for cases completed during that calendar month. Payment is due within 30 days. All fees above include VAT at 20%.