Report Only

|  |  |  |
| --- | --- | --- |
| New Business | 1 Plan | Per Additional Plan |
| Pension Lump Sum & Regular Business | £125 | £25 |
| Investment Lump Sum & Regular Business | £125 | £25 |
| Short Suitability Letter | £60 | £25 |
|  |  |  |
| Replacement Business | 1 Plan | Per Additional Plan |
| Pension Transfer | £175 | £40 |
| Pension Sharing Order | £175 | £40 |
| Dependent Drawdown | £250 | £40 |
| Internal Crystallisation | £250 | £40 |
| External Crystallisation | £250 | £40 |
| Bond & Unit Trust | £200 | £25 |
| Equity ISA Transfer | £125 | £25 |
| Cash ISA Transfer | £100 | £25 |

Full Case

|  |  |  |
| --- | --- | --- |
| New Business | 1 Plan | Per Additional Plan |
| Pension Lump Sum & Regular Business | £200 | £25 |
| Investment Lump Sum & Regular Business | £200 | £25 |
| Short Suitability Letter | £125 | £25 |
|  |  |  |
| Replacement Business | 1 Plan | Per Additional Plan |
| Pension Transfer | £350 | £40 |
| Pension Sharing Order | £350 | £40 |
| Dependent Drawdown | £425 | £40 |
| Internal Crystallisation | £425 | £40 |
| External Crystallisation | £425 | £40 |
| Bond & Unit Trust | £300 | £25 |
| Equity ISA Transfer | £200 | £25 |
| Cash ISA Transfer | £175 | £25 |

Appendix – i

Should a couple, such as husband and wife, wish to do business, in relation to pension transfers, then this will incur 2 X the 1 plan fee as it is two separate pieces of business. For each additional plan it is the additional plan price. For Investment or other business, it is one cost, as these can be written under one SL.

Full case includes CYC, Illustration & Suitability Letter.

All cases include a CFR check as standard, as well as checking any relevant ceding information from providers.

Data gathering is charged at £30 per plan, as stated below in the Practice Support Prices.

Practice Support

|  |  |
| --- | --- |
| Review Letters | 1 Plan |
| Drawdown Review – No Changes/No Income | £80 |
| Drawdown Review – Income | £150 |
| Annual Review Letter | £30 |
| Fund Switch Letter | £30 |
|  |  |
| Miscellaneous Support | 1 Plan |
| Data Gathering | £30 |

Appendix – ii

Annual Review letters are subject to discount based on the amount sent per calendar month. The discount is applied as follows:

* Less than 10 letters – No discount
* 10 – 20 letters – 10% per letter
* 20 or more letters – 20% per letter

if the fund switch is a standalone ad hoc letter, this is charged at £30 per letter. If a fund switch is the result of an annual review, then it is included in the annual review letter and an additional £15 is added onto the annual review letter cost.

Couples do not incur a dual charge on an annual review.