



AETERNUS

LIFELONG PARTNERS

PRICE LIST

REPORT ONLY

New Business

Pension Lump Sum & Regular Business	£125
Investment Lump Sum & Regular Business	£125
Short Suitability Letter	£60
Inheritance Tax/Trusts	£225

£25 Per additional plan unless stated – subject to change

Replacement Business

Pension Transfer (excluding Safeguarded Benefits)	£265
Pension Sharing Order	£265
Dependent Drawdown	£350
Internal Crystallisation	£350
External Drawdown Transfer	£400

£40 Per additional plan unless stated* – subject to change

**multiple plans may result in discounted rates subject to agreement*

Bond & Unit Trust Investment	£200
Equity ISA Transfer	£175
Cash ISA Transfer	£125
Inheritance Tax/Trusts	£300

£25 Per additional plan unless stated – subject to change

PRE-CASE

New Business

Pension Lump Sum & Regular Business	£175
Investment Lump Sum & Regular Business	£175
Short Suitability Letter	£125
Inheritance Tax/Trusts	£275

£25 Per additional plan unless stated – subject to change

Replacement Business

Pension Transfer (excluding Safeguarded Benefits)	£350
Pension Sharing Order	£325
Dependent Drawdown	£400
Internal Crystallisation	£400
External Drawdown Transfer	£450

£40 Per additional plan unless stated* – subject to change

**multiple plans may result in discounted rates subject to agreement*

Bond & Unit Trust Investment	£250
Equity ISA Transfer	£225
Cash ISA Transfer	£175
Inheritance Tax/Trusts	£350

£25 Per additional plan unless stated – subject to change

FULL CASE

New Business

Pension Lump Sum & Regular Business	£200
Investment Lump Sum & Regular Business	£200
Short Suitability Letter	£150
Inheritance Tax/Trusts	£300

£25 Per additional plan unless stated – subject to change

Replacement Business

Pension Transfer (excluding Safeguarded Benefits)	£425
Pension Sharing Order	£400
Dependent Drawdown	£475
Internal Crystallisation	£475
External Drawdown Transfer	£500

£40 Per additional plan unless stated* – subject to change

**multiple plans may result in discounted rates subject to agreement*

Bond & Unit Trust Investment	£300
Equity ISA Transfer	£275
Cash ISA Transfer	£225
Inheritance Tax/Trusts	£400

£25 Per additional plan unless stated – subject to change