

REPLACEMENT BUSINESS

INVESTMENTS – ISA TRANSFERS (S&S), UNIT TRUST/OEIC, BONDS

NUMBER OF PLANS BEING TRANSFERRED	1 PLAN	EACH ADDITIONAL PLAN
Total charge to Partner per suitability letter	£340	+£65

PENSIONS – PERSONAL PENSION TO RA, OCCUPATIONAL MONEY PURCHASE TO RA

NUMBER OF PLANS BEING TRANSFERRED	1 PLAN	EACH ADDITIONAL PLAN
Total charge to Partner per suitability letter	£370	+£65
Safeguarded Benefits	£785	+£65 - (If additional plans <u>do not</u> include safeguarded benefits) +£130 - (If additional plans <u>do</u> include safeguarded benefits)

DRAWDOWN & UFPLS RECOMMENDATIONS (EXCLUDING DB SCHEMES)

DESCRIPTION OF BUSINESS	UP TO 2 PLANS	EACH ADDITIONAL PLAN
External Drawdown Cases	£575	+£65
Internal Drawdown Cases	£500	+£65
External UFPLS Cases	£575	+£65
Internal UFPLS Cases	£370	+£65

IHT REPLACEMENTS – TO LOAN PLANS, DGP, ITS, EIS

NUMBER OF PLANS BEING TRANSFERRED	1 PLAN	EACH ADDITIONAL PLAN
Loan Plans, DGP, ITS, EIS	£440	+£65
Long Term Care	£440	+£65

OTHER REPLACEMENT BUSINESS

DESCRIPTION OF BUSINESS	TOTAL CHARGE TO PARTNER PER SUITABILITY LETTER
Cash ISA Transfers only	£210
To a VCT	£410

NEW BUSINESS

DESCRIPTION OF BUSINESS	1 PLAN	EACH ADDITIONAL PLAN
New Cash Investment (excl IHT, EIS or VCT)	£140	+£32.50
IHT Plans including (ITS & EIS), VCT	£260	+£32.50
Pension (Regular/Lump Sum)	£140	+£32.50
Long Term Care	£315	+£32.50

OTHER - NEW BUSINESS

DESCRIPTION OF BUSINESS	1 PLAN	EACH ADDITIONAL PLAN
Protection	£210	+£32.50
Drawdown Review Letter	£260	
Annuities	£210	+£32.50

NON-PROCEEDING CASES

Case ceasing in letter writing	£150 or full case if lower	Additional Services Upload of notes to CFR or completion of partially completed CFR £60 p/h
After completion of suitability letter	Full Case Fee	
Case ceasing in data gathering (ie CYC)	£75* (For up to 3 plans)	

Please note: Our pricing is provided on a case by case basis and is dependent on the advice type and complexity of the case. The Paraplanning Partnership reserve the right to revise its fee on a case by case basis and to charge additional fees where the time to complete the suitability letter is excessive. For example, where the advice being given changes following work from The Paraplanning Partnership, reserves the right to charge an additional fee for extra work involved. Any additional fees will be agreed with you in advance

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