

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	*£355	+£67.50

*Cases requiring an Income Sustainability Calculator will be charged an additional £75.

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	£385	+£67.50
Safeguarded Benefits	£825	+£67.50 - (If additional plans <u>do not</u> include safeguarded benefits) +£135 - (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	£600	+£67.50
Internal Drawdown Cases	£500	+£67.50
External UFPLS Cases	£600	+£67.50
Internal UFPLS Cases	£370	+£67.50

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

NUMBER OF PLANS BEING TRANSFERRED	1 PLAN	EACH ADDITIONAL PLAN
Loan Plans, DGP, ITS, EIS	£460	+£67.50
Long Term Care	£500	+£67.50

OTHER REPLACEMENT BUSINESS

DESCRIPTION OF BUSINESS	TOTAL CHARGE TO PARTNER PER SUITABILITY LETTER
Cash ISA Transfers only	£220
To a VCT	£430

NEW BUSINESS

DESCRIPTION OF BUSINESS	1 PLAN	EACH ADDITIONAL PLAN
New Cash Investment (excluding pension, IHT, EIS or VCT)	£145	+£33.75
IHT Plans including (ITS & EIS), VCT	£270	+£33.75
Pension (Regular/Lump Sum)	*£145	+£33.75
Combined Investment & Pension	£212.50 (2 Plans)	+£33.75
Short Top Up Letter	£72.50	N/A
Long Term Care Advice	£350	+£33.75

*Employer DB cases that require additional testing will incur an additional charge of £75

Ongoing Advice

DESCRIPTION OF BUSINESS	CASE FEE
Ongoing Advice Letter	£72.50
Ongoing Advice Letter / Drawdown Review (No Income or change)	£145
Ongoing Advice Letter / Drawdown Review	£260
Income Sustainability Calculator	£75

OTHER CASES / SERVICES

DESCRIPTION OF BUSINESS	1 PLAN	EACH ADDITIONAL PLAN
Protection	£220	+£33.75
Annuities	£220	+£33.75

DESCRIPTION OF BUSINESS	COST OF SERVICE (per hour)
Letter of Authority Service	*£27.50

*Please note, cases that subsequently go to the paraplanning stage will not be charged for the Letter of Authority service and only the standard case fee will apply.

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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