

PRICING INFORMATION



You will pay us an adviser charge for our advice and services. This will become payable on completion of our work.

There is no charge for the Abridged Advice Service. The following information details the maximum charges however, your actual charge will be confirmed in our suitability report.

FULL PENSION TRANSFER & RELEASE SERVICE – MAXIMUM CHARGES		
To a defined contribution arrangement		
Existing Pension Type	Maximum Initial Adviser Charge	Ongoing Charge
Safeguarded Benefit Pension Scheme (excluding those with Guaranteed Annuity Rates)	Up to £250,000 transfer value – 3% with a minimum of £2,950 (e.g. on £100,000 the charge would be £3,000 and minimum transfer value £10,000). On the next £750,000 transfer value – 2% (e.g. on £500,000 the charge would be £12,500 = 2.5%) On the balance – 1% (e.g. on £1,250,000 the charge would be £30,000 = 2.4%)	0.75% pa
All other non-safeguarded pension arrangements transferred at the same time	A fixed rate of £495.00 each	0.75% pa

EXAMPLES OF THE ONGOING CHARGE

The ongoing charge is linked to a percentage of your remaining investment, the amount we receive will be dependent on the value of your remaining investment each year, deducted from the investment on a monthly basis commencing in the second month.

For example; if the remaining investment was £30,000 and the ongoing charge is 0.75% pa then we would receive £18.75 per month (£225 per annum).

If the remaining investment were £75,000 and the ongoing charge is 0.75% pa then we would receive £46.88 per month (£562.50 per annum).

Please note that the monthly amount would vary up or down as the value of the remaining investment varies.

