

TRANSFER BUREAU PRICING INFORMATION



There is no charge for the Triage or Abridged Advice Service.

The following information details the maximum charges for full pension transfer and release service including any defined contribution arrangements where required:

Transfer Value	Our Fee	Maximum Introducer Fee (optional)	Maximum Total Fee Paid by Client
First £250,000	1.8%	up to 1.2%	3% (Minimum £2,950)
Next £750,000	1.2%	0.8%	2%
Excess over £1 million	0.5%	0.5%	1%

NOTES

The above is for fees that are to be paid directly by the client or deducted from the new arrangement and will be shown in the suitability report, both abridged and full.

You do not have to charge a transfer fee and may come to a separate arrangement with your client, for services rendered, that does not involve us.

You may charge a fixed fee if it does not exceed the maximum fee as calculated above. The minimum fee we will pay out to you is £50.

You may charge an ongoing fee which we will include in our suitability report and on the new one-page summary, as required by the FCA for all safeguarded benefit transfers, excluding those with just a GAR.

For professional advisers – internal use only



EXAMPLES MAXIMUM FEES

TV	Grove Fee	Maximum Introducer Fee	Total Fee	Total %
£100,000	£2,950	£50	£3,000	3.00%
£250,000	£4,500	£3,000	£7,500	3.00%
£500,000	£7,500	£5,000	£12,500	2.50%
£750,000	£10,500	£7,000	£17,500	2.33%
£1,000,000	£13,500	£9,000	£22,500	2.25%
£1,500,000	£16,000	£11,500	£27,500	1.83%

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