

# Fee Menu

## Fee Menu – as at 1<sup>st</sup> July 2009

<b>Initial meeting</b>	<b>Fee</b> No charge
<b>Financial Navigation System</b>	
“Where Am I Now?” Guide and “What Should I Do Now?” Plan	£975 to £2,475
“Am I Still On Track?” Annual Review (Refer to service standard)	
• Partner Service )	0.50% of assets
• Executive Service )	under management
• Private Client Service )	per annum

(VAT at 15% may be charged in certain circumstances)

### Plan Implementation Fees

Arranging Life Policy	£375
Arranging Whole of Life Policy	£575
Arranging Income Protection Policy	£375
Re-registration of investments	£15 per investment
Arranging pension policy (excluding SIPP)	£475
Arranging SIPP's	£875 (from)
Arranging Other Investments	£475 per investment

(Where commission is payable to us by any product provider you have a choice of either paying our fees directly or allowing us to receive commission to settle our fees)

### Other Services

Pension Plan MOT	£275 plus £75 per pension
Arrange pension annuity (including Open Market Option)	£495 or 1% of fund (greater of)

### Other Services

Tax planning including Estate Planning (VAT at 15% may be charged in certain circumstances)	5% of tax saved
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*It pays to know your number!*