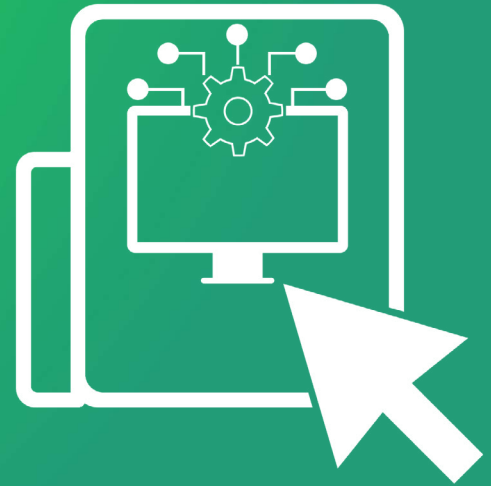


Evidencing Suitability





Evidencing Suitability: The We Complement Paraplanning Service

As your partners in financial planning, we add value to your work. We understand the transformative impact external partnerships can have on businesses, and we recognise the trust you place in us, even before we get acquainted.

We are looking to partner with advice firms that appreciate the value we bring. As partners, our goal is not only to assist you in delivering high-quality financial planning advice; but also to help advisers to excel in their strengths, steering towards your clients' financial goals and broader aspirations.



Our Fee Structure:

We've structured our fees to provide cost-effective and valuable outsourced paraplanning. We maintain flexibility in our fees and transparently communicate them before commencing any work.



Fixed Paraplanning:
Charges start at £350 +
VAT per case.




Initial Onboarding Fee:
£500 + VAT (used as
credit on your first case)



Monthly Retainer:
From £500 + VAT
(utilised 100% against
any cases submitted)



Contact

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 Wecomplement.co.uk