



## Fixed fees

	New Monies - Pension	£250
	DC Pension Transfer	£350 for first recommendation + £100 each additional case
	Drawdown - TFC	£250
	Drawdown – Taxable Withdrawal	£250
	Drawdown - Income	£250
	Annuity Purchase	£300
	Investment Encashments (CGT/ Chargeable Gains calculations etc.)	£300 for first calculation/ recommendation +£200 for each additional
	New Monies - Investment	£250 (£200 if following on from encashment exercise)
	ISA Transfer	£300 for first recommendation +£100 each additional
	Estate Planning (BPR/VCT/ EIS/Trusts etc.)	£400 for first recommendation + £100 for each additional
	Long Term Care (any strategy)	£400
	Protection	£200 for first recommendation +£100 each additional



For a discussions about your specific requirements, we encourage you to schedule an appointment with our Managing Director.

Please get in touch

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