



Paraplanning and Consultancy Services Limited

Paraplanning Service – Schedule of Fees

| Type of Business | Fee for Full Suitability Report – 1 Plan | Each additional plan | Notes |
|---|--|----------------------|--|
| Full Defined Benefit Paraplanning Service | £500 | £375 | Service includes : <ul style="list-style-type: none">• Producing the APTA Report• Providing additional research where required• Writing the Report• Dealing with any remedial action required |
| APTA Report only | £100 | N/A | This fee is offset against the £500 fee for the Full Defined Benefit Paraplanning Service if subsequently required for the client |

| Type of Business | Fee for 1 Scheme | Fee for 2 Schemes | Fee for 3 Schemes | Fee for 4 Schemes | Fee for 5 Schemes |
|---|------------------|-------------------|-------------------|-------------------|-------------------|
| Money Purchase Pension Transfer – Accumulation or Retirement Planning | £200 | £235 | £285 | £350 | £385 |
| Including additional research to complete the report if applicable, submission and remedial work. More than 5 Schemes – Fee to be agreed in advance. | | | | | |

| Type of Business | Fee for 1 Scheme | Fee for 2 Schemes | Fee for 3 Schemes | Fee for 4 Schemes | Fee for 5 Schemes |
|--|------------------|-------------------|-------------------|-------------------|-------------------|
| Drawdown Designation – Existing arrangement facilitates FAD or Transfer to New Arrangement | £200 | £235 | £285 | £350 | £385 |
| Includes additional research to complete the report if applicable, submission and remedial work. More than 5 Schemes – Fee to be agreed in advance. | | | | | |

| Type of Business | Fee for 1 Scheme | Fee for 2 Schemes | Fee for 3 Schemes | Fee for 4 Schemes | Fee for 5 Schemes |
|---|------------------|-------------------|-------------------|-------------------|-------------------|
| Investment Restructure (Bond/GIA/ISA's) | £200 | £235 | £285 | £350 | £385 |
| Includes additional research to complete the report if applicable, submission and remedial work. More than 5 Schemes – Fee to be agreed in advance | | | | | |

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Registered in England & Wales number: 11087200
Director: Peter J Mason



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| Type of Business | Fee for Full Suitability Report | Notes |
|---------------------------------------|---------------------------------|---|
| Regular/Lump Sum Pension Plan | £125 | Includes additional research to complete the report if applicable, submission and remedial work |
| Annuity Purchase | £100 | Includes additional research to complete the report if applicable, submission and remedial work |
| Investment Bond/GIA/ISA's – New Money | £125 | Includes additional research to complete the report if applicable, submission and remedial work |
| EIS/VCT/AIM Investments | £175 | Includes additional research to complete the report if applicable, submission and remedial work |
| Inheritance Tax/Trust Planning | £300 | Includes additional research to complete the report if applicable, and remedial work |
| Protection | £75 | Includes additional research to complete the report if applicable, and remedial work |
| Reviews | £100 | Including Defaqto Report (The fee is dependent may vary according to the complexity involved – this will be advised in advance of the Work being completed) |

ALL OUR FEES ARE SUBJECT TO VAT, THIS IS IN ADDITION TO THE FEES SHOWN ABOVE

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