

Platinum Paraplanning Limited

Services & Fees

Replacement Business

Type	Cost
Pension	£320.00 and £50.00 per additional plan
Pension (with Safeguarded Benefits)	£500.00 and £100.00 per additional plan
First Time Internal Crystallisation – TFC (Capital Needs)	£400.00
First Time Internal Crystallisation – TFC For Income Needs or Income Required Within 5 Years	£475.00
External Pension Transfer with Crystallisation Event - TFC (Capital Needs)	£475.00 and £50.00 per additional plan
External Pension Transfer with Crystallisation Event - TFC For Income Needs or Income Required Within 5 Years	£500.00 and £50.00 per additional plan
Drawdown to Drawdown Transfer – No Income Required	£475.00 and £50.00 per additional plan
Drawdown to Drawdown Transfer – Income Required	£500.00 and £50.00 per additional plan
Internal Drawdown – Further Crystallisation - TFC (Capital Needs)	£200.00
Internal Drawdown – Further Crystallisation - TFC For Income Needs or Income Required Within 5 Years	£250.00
UFPLS	£300.00
Investment (Bonds & Unit Trusts etc)	£250.00 and £75.00 per additional plan
Equity ISA	£175.00 and £25.00 per additional plan
Cash ISA	£125.00 and £25.00 per additional plan
IHT	£450.00 and £75.00 per additional plan
Long Term Care	£450.00

New Business

Type	Cost
Pension – Lump Sum & Regulars (Excluding Carry Forward Calculation)	£125.00
Investment Lump Sum & Regulars (Excluding EIS/VCT & IHT)	£125.00 and £25.00 per additional plan
Short Suitability Letter	£75.00
EIS & VCT	£200.00 and £25.00 per additional plan
Discretionary Fund Management	£250.00
Long Term Care	£250.00 and £25.00 per additional plan
IHT/Trust investments	£250.00 and £25.00 per additional plan
Annuities	£250.00
Protection – Personal	£150.00 and £25.00 per additional plan
Protection – Corporate Individual	£150.00 and £25.00 per additional plan
Protection – Corporate Group	£200.00 and £25.00 per additional plan

Servicing Costs & Calculations

Type	Cost
Drawdown Review – No Income	£100.00
Drawdown Review – With Income No Change	£150.00
Fund Switch Confirmation Letter	£75.00
Standard Review Letter	From £75.00 depending on additional items required
Addendum to Original Suitability Letter	£50.00
Carry Forward Calculation	£75.00
Additional CYC or Initial Check	£75.00
Inheritance Tax Calculation	£75.00
Other Administration Tasks/Calculations	From £40.00 per hour

Terms & Conditions

- The prices quoted do not include gathering of ceding scheme information. Please contact us if you wish to include this service. An additional cost may apply.
- We can offer bespoke quotes for any services that are not listed here, please contact us for further information.
- A joint investment is treated as one case.
- Additional fees may be incurred on the above prices if ceding scheme information falls outside of the 6 months' timeframe, and we need to obtain further information.
- On occasion the prices may vary, depending on additional requirements for a case. We will liaise directly with you to agree an acceptable fee prior to proceeding.
- The initial CYC is included within the price for a replacement case. Any additional CYC's will be charged at the applicable rate.
- If a case does not proceed due to the CYC exceeding acceptable limits, you will only be charged for the CYC.
- If advice changes after the initial report has been completed, we reserve the right to charge an additional fee for amendments made.
- The cost of each additional plan is per individual policy, not per provider.
- We aim to return your case within 5 working days. This may be delayed if information is missing.
- Prices do not include VAT.
- Prices are correct as at September 2023.