

# Example Fee Illustrations

Our fees are designed to be proportional, fair, and aligned with the advice and planning provided. The examples below are intended to illustrate how fees may apply in common situations. All fees are agreed in advance before any work begins.



## Example 1: Pension Consolidation with Ongoing Financial Planning

A client consolidating pensions with a total value of **£800,000**, supported by ongoing financial planning and regular reviews.

- **Initial fee:** £5,000
- **Ongoing fee:** 0.50% per annum



## Example 2: Investing an Inheritance

A client investing **£400,000** received from an inheritance, with ongoing advice and portfolio oversight.

- **Initial fee:** £4,000
- **Ongoing fee:** 0.50% per annum



## Example 3: ISA Consolidation and Ongoing Planning

A client consolidating and investing **£200,000** held in cash ISAs, supported by ongoing financial planning.

- **Initial fee:** £2,500
- **Ongoing fee:** 0.75% per annum

The examples shown are for illustration purposes only and do not constitute a recommendation. Fees may vary depending on individual circumstances and the services provided. All fees will be disclosed and agreed in writing before any advice is implemented.

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