

## Fees

We charge fees based on the work involved and the complexity of your financial affairs, not your wealth.

An indication of our fees:

- initial financial plan between £6,000 and £20,000
- ongoing Stewardship Service between £15,000 and £30,000 pa. This includes financial planning and investment management
- implementing recommendations arising from the plan or Stewardship Service. For example, taking tax-free cash from a SIPP (self-invested pension), arranging investments or helping with wills. We quote our fees (based on the time it takes) when we know what work is involved.

Our fees may be subject to VAT.

