



## Corporate SIPP MENU OF FEES

1st January 2018

<b>New Scheme establishment</b>	£975.00
<b>Ongoing annual charges</b>	£90.00 p.m.
<b>Property Purchase</b> (using preferred solicitor)	£500.00
<b>Property Purchase</b> (other solicitor)	£750.00
<b>Property Annual Fee</b> (per property)	£450.00 p.a
<b>In specie contribution</b>	£500.00
<b>Mortgage Arrangement or redemption charge</b>	£250.00
<b>New Lease or Rent Review</b>	£150.00
<b>Loan/Borrowing by Trustees Feasibility</b>	£150.00
<b>Loan/Borrowing Documentation</b>	£150.00
<b>Annual Loan/ Mortgage fee</b>	£140.00 per annum
<b>Property Development</b>	1% of total cost of property invoices
<b>Transfers in</b> <b>Cash</b>	£75.00 per transfer
<b>In-Specie</b>	Time cost
<b>HMRC Reporting event</b>	£75.00
<b>Benefit Crystallisation event</b>	£100.00 per member
<b>Annual Income Drawdown Charge</b>	£150.00 p.a. / per member
<b>Flexi Access Drawdown or UFPLS</b>	£100.00 per payment

<b>Capped Drawdown Review</b>		£100.00
<b>Payment of death benefits, including in-specie payments</b>		Time Cost
<b>Payment of dependent, nominee or Successor's pension</b>		£200.00
<b>Pension share on divorce</b>		Time cost
<b>Ad hoc Valuation and pension statements</b>		£50.00
<b>VAT</b>	<b>Registration/ de-registration</b>	£150.00
	<b>Per periodic return</b>	£80.00
	<b>Opt to tax a property</b>	£100.00
<b>Transfers Out</b>		£500.00 plus £30 per asset except property
<b>External Deposit Bank Account</b>		£200.00 on set up
<b>Annual Administration of External Deposit Account</b>		£90.00 per annum
<b>Cash Transfers to and from External Deposit Account</b>		£25.00 per transaction
<b>Investment with standard panel investment</b>		Nil
<b>Investment with standard non panel investment</b>		£30.00 on set up
<b>Arranging payments to investments and encashing investments (panel and non panel)</b>		£25.00 per payment

**Purchase or Sale of Non Standard investments**

£900.00 per request

**Annual fee for Non Standard investments**

£450.00 per annum

**Other events charged on a time cost basis**

### **Annual Charges**

The Ongoing Annual Charge is paid monthly in advance by standing order. This fee includes the annual Data Protection Act and Pension Regular returns and an annual meeting at our offices.

The Property Annual Fee, Annual Loan or Mortgage fee and Annual Income Drawdown Charge are paid annually in advance.

### **Additional Work**

We reserve the right to charge on a time cost basis for work over and above what is normally expected in any of the above scenarios. We will however, give prior advice wherever possible. Specific possible causes of such additional charges would be any specific work caused as a result of changes in pension legislation or property development.

### **Please Note**

These fees are all subject to VAT, except the Annual Platform Charge.  
Fees will increase each year in January by the Average Weekly Earnings (AWE).  
Property Fee does not include Solicitors Fees.  
We outsource actuarial work which will be invoiced at cost.

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