

Fee Schedule for Pension Reports and Financial Forecasts

Report Type	Report Content	Fee
Standard Reports	<p>Our standard report has been designed to meet the most common calculations we are asked to undertake, we have broken this into four different sections :</p> <p>Equality of Income To show the appropriate pension share required to achieve equality of income at a specific retirement age, the fee allows for two different ages to be calculated, additional fees are levied for additional retirement ages. (£250 per additional calculation)</p> <p>Equality of Capital To calculate the pension share required to provide equality of capital values based on an assessment of the fair value of the pension benefits accrued. This includes an estimate of the income payable at retirement.</p> <p>Capital Offset To calculate the amount of non-pension assets that would need to be transferred from one party to the other in order to offset the benefits of a Pension Sharing Order.</p> <p>Additional Calculations excluding benefits accrued outside the relationship To carry out the calculations detailed above but with regard to benefits accrued within a specific period</p>	<p>£1,650</p> <p>£220</p> <p>Included without any additional fee</p> <p>£500 per period</p>
Where specific questions are asked in the letter of instruction that are outside of the typical content of our standard report, we will always tell you if there is any additional fee before we commence our work.		
Data Gathering	With the appropriate letter of authority we will gather all the information needed to prepare a report.	£60
Capital Offset Reports	A standalone report specifically looking at offsetting pensions against other matrimonial assets. We will provide you with calculations based upon the two most common methods of generating income in retirement from pension schemes	£1,050
Financial Forecasts	<p>The use of graphs and charts to show your client how their financial future will look.</p> <p>We can test drive up to three different settlement scenarios to show which may be best and give your client confidence with the proposal. The forecasts and the scenario planning will be presented in a virtual meeting</p>	£1,050