



Southdown Consultants

Fee schedule for the period 1 June 2026 to 31 May 2027

Report type	Fees (exc. VAT)	Commentary and content
Equality of income	£1,900	The Pension Sharing Order or orders that would achieve equalisation of pension benefits in retirement, both in respect of income and lump sum (where possible).
Equality of capital	£300	The Pension Sharing Order or orders that would be required to achieve capital equalisation of the parties' pensions based on an assessment of the capital value of the parties' respective pensions.
Offsetting	£150	Calculation of the amount of capital to be passed between the parties in lieu of a pension share(s) being implemented
Relationship accrual	£550 per period	Limiting the calculations detailed above (i.e. income, capital or offsetting) to a specific period e.g. period of marriage and/or cohabitation.
Uniformed schemes complexity premium	£300	One-off fee applied for uniformed schemes to reflect inherent complexities where members may be or are eligible for generous early retirement terms. Applies as a one-off, not per scheme.
Additional work		
Data gathering	£60 per scheme	With the appropriate letter of authority, we will gather all the information needed to prepare a report
Bespoke queries/analysis	Case by case (usually starting at £300)	We will confirm if there is any additional fee before we commence our work.
Update to original report	Depends on when requested	<ol style="list-style-type: none"> If requested <u>within</u> 12-months of original report date: 30% of original report fee (minimum £750) If requested <u>after</u> 12-months of original report date: 60% of original report fee (minimum £1,500)
Responding to queries on our report	Depends on volume and timing	<p>Generally, if queries are raised within a reasonable period of our report date (within a few weeks), relate to clarification on our report / calculations, and are reasonable in volume, these are free of charge.</p> <p>For more involved queries, any additional work required, alternative scenarios, or for queries raised outside of a reasonable period, then additional fees will be charged. These will vary but may start at £300</p>

Examples of common report types and associated fees

Calculations required	Fee breakdown	Final fee (excl. VAT)
Common reports		
Equality of income	£1,900	£1,900
Equality of income + Offsetting	£1,900 + £150	£2,050
Equality of income + Equality of capital	£1,900 + £300	£2,200
Equality of income + Equality of capital + Offsetting	£1,900 + £300 + £150	£2,350
Additional relationship accrual		
Equality of income + Relationship accrual (one scenario)	£1,900 + £550	£2,450
Equality of income + Relationship accrual (more than one scenario)	£1,900 + (£550 x number of scenarios)	£2,450+
Multiple report outcomes (examples)		
Equality of income + Equality of Capital + Offsetting + Relationship accrual (one scenario)	£1,900 + £300 + £150 + £550	£2,900
As above, but one or more schemes are uniformed with generous early retirement terms available	£1,900 + £300 + £150 + £550 + £300	£3,200
As above, but two relationship accrual scenarios	£1,900 + £300 + £150 + £550 + £550 + £300	£3,750

Comments

- There is no general limit to the number of schemes, within reason. If additional fees are payable, we will confirm this at the outset.
- Our equality of income calculations allow up to three equalisation ages.
- Where specific questions are asked in the letter of instruction that are outside of the typical content of our standard report, we will tell you in advance.
- Where we are asked to gather data, a signed Letter of Authority is required.
- All fees are subject to VAT and are updated annually from 1 June.
- We reserve the right to charge additional fees for dealing with a significant number of queries during the report or data gathering stage.