



Fee Schedule for Pension Reports and Financial Forecasts

Report Type	Report Content	Fee
Equality of Income & Capital Offset – Our Core Report	<p>Our core report has been designed to meet the most common calculations we are asked to undertake. It is a report to show the appropriate pension share required to achieve equality of income at a specific retirement age / date.</p> <p>We include calculations (where requested) to show 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>	£1,850
Equality of Capital – Additional Calculation	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.	£250
Relationship Accrual – Additional Calculations	To carry out the calculations detailed above but limited to benefits accrued within a specific period e.g. the period of marriage.	£500 per period
Data Gathering	With the appropriate letter of authority we will gather all the information needed to prepare a report.	£60 per pension scheme
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.		

All fees are subject to VAT. Correct as at June 2025. Southdown Consultants Ltd