

# MW Paraplanning

Paraplanning Support Costs

## New Business (Cost per suitability letter)

Product Type	Cost — 1 Plan	Each Additional Plan
New Cash Investments / ISA (Non IHT)	£175	£25
EIS / VCT	£275	£25
Protection (Personal)	£175	£25
Retirement Account / Pension New Money	£175	£25
Annuities	£250	£25
IHT / Trust — New Money	£300	£25

## Replacement Business (Cost per suitability letter)

Product Type	Cost — 1 Plan	Each Additional Plan
Pension Transfer (Money Purchase)	£275	£25
Investment / Bond Replacement	£275	£25
External Drawdown Transfer	£525	£25
First Time Internal Crystallisation — TFC (Capital Needs)	£425	N/A
First Time Crystallisation — TFC with Cashflow Required	£475	N/A
Internal Replacement	£225	£25
UFPLS	£275	N/A
IHT / Trust — Replacement	£450	£25
Stocks & Shares ISA Transfer	£225	£25
Cash ISA Transfer	£150	£25

## Additional Services & Calculations

Product Type	Cost — 1 Plan	Each Additional Plan
Annual / Standard Review Letter	£75	£25
Drawdown Review	£125	N/A
Standalone CYC	£75	£25
Carry Forward Calculation (within SL)	£50	N/A
Standalone Carry Forward Calculation	£75	N/A

Short Suitability Letter	£75	£25
Standalone IHT Calculation	£75	N/A
Ad Hoc Work	£50 per hour	N/A

### **Pricing Policy**

The prices listed in this document are intended as a guide and reflect standard case complexity. MW Paraplanning reserves the right to review and adjust fees where a case requires a significant amount of additional time and work beyond what would reasonably be expected. This includes, but is not limited to, cases involving complex or incomplete information, multiple amendments following submission, or significant changes to advice after the suitability letter has been drafted. Where additional charges are anticipated, MW Paraplanning will notify the adviser in advance and agree a revised fee before proceeding.