



Fee Script

Fact Sheet

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“Let me tell you how it works from here:

The next step is what we call a Discovery Meeting. We’ll get you back in to go through all the details of your existing investments, pensions and policies and tax structures. We will then write off to some of your existing providers to get the precise details on things like pensions and insurance policies. That process can take 3-4 weeks and a couple of attempts, as often they send back half the information we request, but my team are pretty good at getting what we need.

We’ll then do some analysis and build some financial models and get you back in for what we call the Presentation Meeting. There we take you through our draft strategies and recommendations.

We then check in with you and modify the plan until things are right.

The fee for that phase of the initial planning work will be £xxxx.

If you want us to implement the strategy we will charge an implementation fee of xx% of monies we are investing on your behalf or a flat fee, if we are not investing any money. The fee for this phase of the work will be communicated to you precisely at the end of the initial planning phase once we know what we are being asked to do, so you’ll always know what you are up for before any work is commenced on your behalf. We work on a no surprises philosophy.

If you then want to move onto our ongoing review service, there will be an annual fee of 1% which includes management of your portfolio and xx face-to-face reviews per year. You can also call, email or meet with us as often as you like in between scheduled dates at no extra charge. Does that make sense?”

(Handle any questions that arise. Questions from the client are usually a ‘hand-to-dance’ rather than a challenge. They just want to understand clearly what they will pay.)

