

Abacus Financial Options Ltd

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Ad hoc Services Fees Menu

New Clients	
First meeting with full factfind	£0.00
Report from factfind and recommendations <i>Fee generated from implementation of recommendations may offset this fee</i> <i>Please refer to our terms of business for details of charging structures</i>	£295.00
Project work cost to be agreed minimum:	£400.00

Additional Services Available to New and Existing Clients, costs to be agreed individually, fee shown is minimum	
Probate work	£600.00
Ad hoc request for documents for taxation purposes	£250.00
Review/recommendation being made in addition to client program	£295.00
Meeting with client and third party professionals	£195.00
Annuity purchase with host company	£350.00
Pension review and advice for consolidation overview	£500.00
Stakeholder/NEST pension advice and recommendation	£695.00
Report and recommendation for drawdown pension	£750.00
Annual review of drawdown pension	£750.00
Tri-annual review of drawdown pension	£750.00

Miscellaneous	
Requests to be agreed based on an hourly rate of	£150.00 per hour