

**UPDATED**

# Pension Transfer Advice: Fee Schedule



Announcing the IPTSpecialists'

## "Safeguarded Benefits Transfer Advice Service"

From 6 April 2015, all transfers from a UK defined benefit pension scheme to a defined contribution scheme like a SIPP or a QROPS must be accompanied by advice from an FCA authorised adviser together with a statement from that adviser in a form prescribed by regulations which is provided to the transferring scheme trustees.

IPTSpecialists are able to offer two levels of "Safeguarded benefits transfer advice" to you, the IFA.

### Advice only service

Under this service:

- Step 1:** You gather the information from the UK scheme and provide it together with our client information form.
- Step 2:** An IPTSpecialists FCA-authorized adviser provides an advice letter and a statement in the prescribed form.
- Step 3:** You provide the advice letter and the statement to your client.
- Step 4:** You then deal with the paperwork if the case proceeds.
- Step 5:** You provide the client with investment advice once the transfer completes.

#### Price

Submission fee per case: **£1995\***

*\*Discounts are available for volume, please contact us to discuss*

### Full service

Under this service:

- Step 1:** Your client completes an IPTSpecialists authority letter and client information form.
- Step 2:** IPTSpecialists gather information from the UK scheme.
- Step 3:** An IPTSpecialists FCA-authorized adviser provides an advice letter and a statement in the prescribed form.
- Step 4:** The IPTSpecialists administration team provide a pre-completed documents pack for you to use if your client decides to proceed.
- Step 5:** A helpline service is available for you and / or your client if further help is needed in addition to the advice letter.
- Step 6:** You send IPTSpecialists the completed pack of signed paperwork.
- Step 7:** IPTSpecialists process the transfer through to completion.
- Step 8:** You provide the client with investment advice once the transfer completes.

#### Price

Refundable submission fee per case: £995 (refunded if the transfer proceeds).

Completion fee payable if the client proceeds: 2% of the transfer value subject to a minimum of £1,495 and a maximum of £9,995.

Please contact us for more information.

# ■ IPTspecialists ■

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