

THE PRACTICE BRIDGE

Paraplanning Price List
September 2025

www.thepracticebridge.co.uk
01553 970990

Pensions

Pension (New Money)	£180
Pension Transfers	£425
Additional Plan	£90
Drawdown Transfer	£630
Crystallised Transfer	£630
Internal Transfer	£575
Additional Transfer	£90
Annuity Case	£300
Pension Transfer GARS	£920
If Drawdown For Recommended GAR Cases	£180
Additional GAR Plan	£135

Investments

ISA (New Money)	£180
ISA Transfer	£250
Additional Plan	£90
Internal Replacements	£300
EIS VCT	£300

Protection

Personal Protection	£215
Additional Plan	£90

Prices are inclusive of VAT and data gathering

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Long Term Care

INA (New Money)	£300
INA Invested Money	£480
Additional Encashed Plan	£90
LTC Investment (New Money)	£480
LTC Investment Replacement	£540
Additional Encashed Plan	£90

Inheritance Tax

Trust Planning - Replacements	£500
Additional Plan	£90
Trust Planning - New Money	£360
Additional Plan	£90

Additional Services

CYC	£120
Carry Forward Calculations	£63
Short Suitability Letter	£75
GAR Check	£225
Each Additional GAR	£120
Annual Review	£66
Drawdown Review	£126
Decumulation Review (Income)	£189
Decumulation Review (Income doesn't last)	£300
Annual Review With Top Up	£96
Voyant Cashflow	£180

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Terms and Conditions

Prices are inclusive of VAT and data gathering after the initial information has been provided.

If a case proceeds to approval and any further changes are required, we reserve the rights to charge a fee for any amendments at an hourly rate of £80 per hour plus VAT

Any redirections will be classed as a replacement

Any cases that are graded as 'Unclear' will be subject to a £50 price reduction

All fees will be invoiced on the 1st of the month after approval from BA

If a case is a not being proceeded with or there is no communication from the adviser after six weeks this will be invoiced at the hours used by the team and paraplanners.

A handover is required before we will start work on the case and if the handover is not clear enough and information is not provided by the adviser – which subsequently leads to an unclear, then we reserve the right to charge in full

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