

The table below shows the cost of the advice and planning services we offer. A full financial plan will cost £3,000 plus VAT, although we are happy to break this into two parts if preferred.

SERVICE	WHAT IS INCLUDED?	FEES
Part 1 Financial Plan	<p>We will have an initial discussion to talk about your current position, your desired lifestyle and your future goals</p> <p>We will collect all the relevant information needed to build up a picture of your current position and expectations for future changes. We will ask you to supply lots of financial data and we will write to third party providers for confirmation of existing arrangements</p> <p>We will input the data collected into our financial planning software and create the financial plan framework to show your current position</p> <p>We will arrange a presentation meeting to explain the output from the financial plan and prepare a report to show the current position</p>	£1,500 + VAT
Part 2 Financial Plan	<p>We will discuss “what if?” scenarios to show the impact of different planning issues on your financial position to help you understand how certain actions will help you make decisions. We will discuss the planning scenarios and reach conclusions on the preferred route to follow</p> <p>We will prepare a financial planning report which will discuss the issues raised in the presentation meeting and set out the revised position, as well as our strategic recommendations for action to be taken to meet your goals</p> <p>A further meeting is available for clarification on outstanding issues, and to take forward the next steps to implementing the recommendations to be taken up</p>	£1,500 + VAT
Full Financial Plan	Includes all the elements mentioned above	£3,000 + VAT
Project work	We will discuss the nature of the project to be undertaken and provide a quote for a fixed fee	£TBA