

## ARA Fees for Suitability Report Writing Service

The pricing structure is based on a menu system, with the cost of the various components outlined below.

Please note – These costs act only as a guideline, and are in no way binding. The definitive cost of providing a report will be confirmed in a proposal, which will be emailed to you prior to us commencing work on a report.

### Basic Report Components

Report covering one area of financial planning	£140
Each additional area of financial planning to be covered within the report	£50
Each additional recommendation within the same area of financial planning	£25

### Review of Existing Arrangements

To contact existing company and provide detailed Policy Information Form	£20 per policy
Inclusion of a review within the report (with recommendation to retain, IFS, transfer etc)	£10 per policy
Pension Transfer only – Analysis and provision of backup justification	Detailed in Proposal

### Optional Extras

Provision of quote / illustration	£10 per quote
Provision of Aequos Report (justification for product selection)	£15 per report
Calculations (e.g Chargeable Gain etc)	Detailed in Proposal
Research of product / provider	Detailed in Proposal
Investment Strategy - Fund Research & Portfolio Creation	Detailed in Proposal
Fund Fact Sheets	£3 per Fact Sheet

*All fees are subject to VAT and are based on our standard terms of business*

# AlexanderRowland

ASSOCIATES