

# West Financial Management Co Ltd

## The Menu Tariff January 2011

Fixed Fees No Hourly Rates

### Meeting Fee

Client Care Programme Gold and Silver clients	Nil
Discovery Meeting (1 <sup>st</sup> initial meeting)	£127 #
Business/Personal Development Meeting (approx 1½ hours)	£340

### Report Fee (Optional)

Advice Summary	£237
Advice Summary (Detailed)	£595

### Investments \*

£1 - £50,000	4.25%
£50,001 - £100,000	4.00%
£101,000 - £499,999	3.50%
£500,000	3.00%

Investments of £1,000,000 plus, negotiable

Example Investment £10,000 @ 4.25% = £425

Example Investment £50,000 @ 4.00% = £2,000

This is per transaction and not the total amount invested

\*Plus .50% annual renewal fee, (paid by the investment provider), this fee can be used as credit, towards the Client Care Programme. (See CCP leaflet).

### Regular Savings

One month's contribution fee Minimum £157 Maximum £1,000  
Plus any applicable provider fee/commission

### Insurance Premiums

One month's contribution Minimum fee £157 Maximum fee £1,000  
Plus any applicable provider fee/commission  
Application fee £100 per policy (Non refundable)

### Annuities (Life Time)

Research per policy per provider £57 each  
Implementation one month's pension  
Minimum £157 Maximum £1,000

Plus any applicable provider fee/commission

DWP (State pension forecast) £37

### Annuities (Immediate)

Implementation - 4% fee, or commission based on annuity purchase price  
Personalised quotations fee £100 (Non refundable)

# Fully refundable see 100% satisfaction guarantee.

## **Admin/Review/Management Fee**

January 2010

### **Agency change**

£57 per policy  
Maximum fee £570

### **Change of address** per provider

£25

### **Complaints**

Initial enquiry letter  
Complaint completion

£100  
Agreed fixed fee on positive result

### **Fact Find** Copy

£97

### **Fund performance** review

£12.50 per fund  
Minimum fee £157

### **Life Assurance Trust**

£237

### **Re-registration/Transfer**

2% Fee

Minimum £157  
Maximum £5,000

## **Switches/Re-balance**

1% Fee

Minimum £157  
Maximum £5,000

### **Travelling**

.40p per mile

### **Valuation**

£25 per policy/fund  
Minimum fee £157

### **Withdrawals/Surrenders**

Amount withdrawn 1%

Minimum £157  
Maximum £1,000

Stop or start withdrawals

£57 per plan

All prices inclusive of VAT