

Walker Crips SIPP Self Invested Personal Pension standard tariff

Standard fees (all charges below are subject to VAT)

Establishment charge (waived if WCIM investment portfolio only) **£150**

Annual charge - payable in advance **£325**
(£295 if WCIM investment portfolio only)

This charge will cover the following:

- Operating the SIPP bank account
- Maintaining investment records and providing an annual valuation
- Provision of the trustee for the SIPP
- Accepting cash contributions into the SIPP
- Reclaiming income tax on contributions
- Reclaiming investment tax, where applicable
- Checking, approving and signing all investment documentation
- Maintaining full records for the SIPP
- Dealing with routine general enquires and correspondence
- Submission of statutory returns to regulatory bodies
- Dealing with changes in legislation etc. and revising the SIPP as necessary

Fixed fees do not apply to some areas of work as the time spent can vary considerably. These can include more complex and time consuming transfers, complicated and larger payments with clients, detailed correspondence or meetings with other professional advisors. Our standard rate for this type of work is £150 per hour.

Additional charges to the standard fee

Additional charges will be levied from the fund for additional asset holdings, specific transactions and services provided on an individual scheme basis (please see additional fees on page 2)

The SIPP may also pay fees to any professional advisor you use e.g. To manage your investments. Such charges will be agreed with the advisor

Walker Crips Pensions

Apollo House, Eboracum Way, York YO31 7RE | 01904 544322 | sipp@wcgplc.co.uk | walkercrips.co.uk/pensions

Walker Crips Pensions is the trading name of Ebor Trustees Limited which is authorised and regulated by the Financial Conduct Authority (FRN: 462002). Registered in England and Wales number 3514268

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Additional fees (all charges below are subject to VAT)

Multi asset holder: Annual charge	£325
Transfer in and out:	
Cash transfers in (in excess of the initial three)	£60
Transfers in (where the fund is capped/flexi-access drawdown)	£150
Transfers in/transfers out (in specie)	£75
Transfers out/payment of all remaining fund paid via flexi-access drawdown	£300
Other:	
Non-standard investment	£150 per investment
Additional valuations	£100 per copy
Establish/process a deposit/cash/investment account incl. NS&I	£150 each
Change of Custodian/Investment Manager	£150

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Benefits and payment fees (all charges below are subject to VAT)

Establishment of any of the following: Flexi-access drawdown, additional fund designation & uncrystallised funds pension lump sum (Advised - Members taking regulated financial advice)	£150 per trigger event
Establishment of any of the following: Flexi-access drawdown, additional fund designation & uncrystallised funds pension lump sum (Non-advised - Members not taking regulated financial advice)	£250 per trigger event
Capped drawdown to flexi-access drawdown	£100
Regular income payments and PAYE	£200 p.a.
Ad-hoc income payments and PAYE per payment	£150 each
Triennial and ad-hoc reviews: annual reviews after age 75	£150 each
Small lump sum payment	£150
Payment of death benefits/divorce cases	Time cost Subject to a minimum of £500
Establishment of a Walker Crips Beneficiary SIPP (Non-advised only)	£300

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Property fees (all charges below are subject to VAT)

Annual administration charges:

Commercial property holding charge	£400 p.a.
VAT ongoing administration	£200 p.a.
Additional commercial property holding charge	£150 p.a.

Property transactions:

Property purchase	Time cost Subject to a minimum of £650
Create a new lease or renew an existing lease	£300
Transfer of commercial property into Walker Crips SIPP (in-specie)	Time cost Subject to a minimum of £650
Mortgage or loan processing	£350
VAT registration charge	£150
VAT de-registration	£150
Commercial property sale	Time cost Subject to a minimum of £600
Transfer of commercial property out of Walker Crips SIPP (in-specie)	Time cost Subject to a minimum of £600
Aborted commercial property purchase/sale	Time cost Subject to a minimum of £450

VAT will be applied where applicable, based on our understanding of current legislation.

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