

Financial Planning Services

We feel it is important to confirm to our direct clients the likely fees and charges made for the services we provide.

Requirement	What will we do?	What will it cost?
Initial evaluation meeting – Explanation of our role, Compliance procedures and Objective setting.	To confirm our understanding of your current circumstances and objectives based on information contained in the Planning Brief.	Free.
Preparation and presentation of an outline report.	Client information will be analysed, and an outline report will be prepared. You will be offered the opportunity to attend a follow-up meeting to discuss our outline recommendations.	The cost for this report is on a time cost basis charged out at our standard hourly rate of up to £250.
Specific recommendations and implementation of advice on an ongoing basis.	We will arrange for specific recommendations to be prepared, based on the information received regarding your circumstances and requests. On the assumption the specific advice is acceptable we will implement our recommendation and offer to review them on an annual basis.	Our standard charge for this advice and implementation is normally 2% of the invested assets on which we are advising. The cost of providing an annual review is 0.5% per annum, based on the value of the assets being reviewed.
Consultative advice.	We will arrange for specific one off recommendations to be prepared, based on your circumstances and requirements.	Our charge for consultative advice is a maximum of £250 per hour.

All Financial Planning Fees are subject to VAT.

No fee will be charged or commission earned without the prior agreement of the client.

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Group Offices

Belfast Cheltenham Edinburgh Farnham Glasgow
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 Member firm of the London Stock Exchange. Member of LIFFE.
 Authorised and regulated by the Financial Services Authority.
 Rensburg Sheppards Investment Management Limited is registered
 in England. Registered No. 2122340.

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