

CHARGES

REPLACEMENT / TRANSFER BUSINESS	
1 TRANSFER	£375 + VAT
2 TRANSFER	£450 + VAT
3 TRANSFER	£525 + VAT
4 TRANSFER	£600 + VAT
5 + TRANSFER	PLEASE CALL TO AGREE AN APPROPRIATE FEE
ISA TRANSFER	£220 + VAT (FOR 5+ TRANSFERS PLEASE CALL TO AGREE AN APPROPRIATE FEE)
DRAWDOWN AND LTC	£600 + VAT (FOR 5+ TRANSFERS PLEASE CALL TO AGREE AN APPROPRIATE FEE)
IHT	(AN ADDITIONAL FEE OF £50 + VAT PER CASE APPLIES)
DEFINED BENEFIT TRANSFERS	£1,000 + VAT PER SCHEME (FOR MORE THAN 1 SCHEME BEING TRANSFERRED PLEASE CALL TO ARRANGE AN APPROPRIATE FEE)

A single transfer is defined as being a separate policy and includes any redirection of contributions, i.e. three policies with Zurich and three with Standard Life, would be considered as six separate transfers.

NEW BUSINESS (INCLUDING CASH ISA TRANSFERS)	
1 RECOMMENDATION	£125 + VAT
2 RECOMMENDATION	£150 + VAT
3 + RECOMMENDATIONS	£175 + VAT (ADDITIONAL RECOMMENDATIONS £25 + VAT)
DRAWDOWN REVIEW	£125 + VAT
COMPLEX CASES (LTC, IHT (INCLUDING EIS AND VCTS), ANNUITY, DRAWDOWN CONVERSION, CARRY FORWARD CONTRIBUTIONS)	£250 + VAT

NON - PROCEEDING REPLACEMENT BUSINESS CASES

Where the SJP Partner wishes to terminate a Submission Form prior to completion of the Services the SJP Partner shall be liable to pay the following fees to cover Huntswood's costs of Services provided to the date of termination:

STAGE AT WHICH CASES PROCESS CEASES	REPLACEMENT / TRANSFER	DEFINED BENEFIT TRANSFERS
DATA GATHERING / TRIAGE	£100 + VAT	£400 + VAT
LETTER WRITING STAGE	50% OF FULL CASE FEE + VAT	50% OF FULL CASE FEE + VAT
POST LETTER WRITING	FULL CASE FEE + VAT	FULL CASE FEE + VAT