

Our standard fees

At Derbyshire Booth Financial Management Ltd we run a free initial consultation service for all our new clients. This gives those clients the opportunity to sit down with a qualified financial adviser and discuss your specific needs and goals, safe in the knowledge that you are not committed to using our services until you are comfortable and ready. This also allows us as your financial adviser to assess the level of service you need and to discuss the costs involved.

We operate a standard charging structure for the services provided, regardless of the type of product or service. The fee works on the same basis. In this way you can be sure that our advice is always objective and not influenced by any commission which may be generated from third parties.

However, we are committed to being as flexible as possible for our clients how we are paid for our services. Therefore we can take our fees as a commission / fee from any product or service provider if required.

Alternatively we can invoice you and be paid directly. Whatever is more convenient to you.

Initial Tariff	New Investment
3%	On first £150,000
2%	On next £250,000
1%	Above £400,000

If a review service is required the charge is 0.5% of the funds value per annum.

Other services which may not involve investing new monies are charged as follows:

Fee tariff	
Financial Healthcheck	from £295 plus VAT
Pension transfer analysis	from £295 plus VAT
Specific review or investigation	from £295 plus VAT
Annuity Purchase	1-2% of the fund value
Enhanced Annuity Purchase	3% of the fund value

Should you wish to pay a flat hourly rate then this is charged out at £100 per hour for our Financial Adviser and £50 per hour for our para planning services. VAT may also be payable on some of our services. We will inform you if this is the case before any work commences.

Remember that all of the above tariffs will be discussed with you at the free initial consultation before you commit to using our services.