

Reference:

This colour represents Initial Service Only: Initial and Ongoing Service: OPS = Ongoing Planning Service Only

Cost & Service

Initial & Ongoing Service Summary	Simple	Moderate	Complex
At Work starting Initial Financial Planning Fee & Ongoing Fee	£1,800	£2,700	£4,000
At Retirement starting Initial Financial Planning Fee & Ongoing Fee	£2,800	£3,700	£5,000
In Retirement starting Initial Financial Planning Fee & Ongoing Fee	£3,800	£4,700	£6,000
Ongoing Service Cost based on total value of your investments	1% tiered	1% tiered	1% tiered
Initial Needs, Goals & Options Report covering current situation & options to help achieve needs & goals	✔	✔	✔
Access to Mission sense check contact via Mission online portal, video call, email, WhatsApp, telephone (OPS)	✔	✔	✔
Annual Check-in to update finances, needs & goals (OPS)	Online portal	Face to face / online	More frequent if required
Annual Review including valuation and change over 12 months, with ongoing suitability of arrangements assessed (OPS)	✔	Detailed	Detailed
Retirement Insight Summary, review of income needs - drawdown and annuities (At & In Retirement OPS only)	✔	✔	✔
Cashflow Forecasting looking at your position now and in the future. Looking at impact of options to enhance your plan	Simple	Moderate	Moderate - Complex
Tax Planning advice tax efficiency can impact the trajectory in the short and long-term	Simple	Moderate	Moderate - Complex
Investment Strategy advice aligned with your goals and values - Mission Investment Philosophy and Centralised Investment Proposition	Simple	Moderate	Moderate - Complex
Protection Strategy advice (individual and family) Back-up Plan	✔	✔	✔
Initial Financial Planning Strategy Report covering current situation and recommendations to achieve needs & goals	✘	✔	✔
Business Protection Strategy advice Business Back-up Plan	✘	✘	✔
Liaising with third parties such as accountants and solicitors	✘	✘	✔
Estate Planning including trusts (no legal advice)	✘	✘	✔