

DIRECTUS SIPP

Morgan Lloyd Menu of Charges



DIRECTUS SIPP TRUSTEE AND ADMINISTRATION SERVICES

Scheme Administration

Establishment & Annual Fees

Advised Clients

Non Advised Clients

Establishment Fee

£195.00

£325.00

Annual Administration Fee

Collected annually in advance – includes two investment transactions

£325.00

£445.00

Transaction and Drawdown Fees

Advised Clients

Non-Advised Clients

Transfers In (Cash)

Free

Free

In-specie Transfers in of Standard Asset

£195.00

£195.00

Standard Investment Transaction

If 3 or more transactions are completed in a year

£55.00

£55.00

Benefit Crystallisation Calculation

£195.00

£195.00

Annual Income Drawdown Fee

£225.00

£225.00

Review of Pension Income

£130.00

£130.00

Settling Death Benefits

£225.00

£225.00

Transfer Out

£255.00

£255.00

*All fees are subject to VAT | *Note: The annual administration is free when all pension funds are invested via the Morgan Lloyd Invest Platform. All fees except the Annual Administration fee will be collected on completion of the service. Fees correct at February 2026*

Contact us



Morgan Lloyd SIPP Services Limited

T: 01275 379 200

E: mlsipp@morgan-loyd.co.uk

W: www.morgan-loyd.co.uk

The Outlook | Eden Park | Ham Green | Bristol, BS20 0DD