

OUTLOOK SIPP

Morgan Lloyd Menu of Charges



OUTLOOK SIPP TRUSTEE AND ADMINISTRATION SERVICES

Scheme Administration

Establishment Fee

All Clients

£475.00

Annual Fees

Annual Administration fee

Collected annually in advance

Advised Clients

£1,210.00 pa

Non-Advised Clients

£1,660.00 pa

Collected monthly by Direct Debit

£115.00 pm

£160.00 pm

Drawdown Fees

All Clients

Benefit Crystallisation Calculation

£355.00

Annual Income Drawdown Fee

£355.00

Payment of Death Benefits or Pension Sharing Order

£355.00

Review of Pension Income

£135.00

OUTLOOK SIPP TRUSTEE AND ADMINISTRATION SERVICES

Transaction and Transfer Out Fees	All Clients
UK Commercial Property	
• Purchase / Transfer In	£950.00
• Sale / Transfer Out	£570.00
Facilitation of Mortgage Borrowing	£425.00
Annual Non-Panel Insurance Policy Fee	£190.00
Property Annual Fee	£500.00 per property
Property Non-Responder Fee	£200.00
New Tenant Fee (First Tenant Fee)	£185.00
Manual VAT Return Filing	£25.00 per return
Partial Exemption VAT Calculation	£135.00 per return
Arrears Handling Fee	£50.00 monthly
Liquidation Claim Submission	£445.00
Non-Standard Asset Purchase Fee	£690.00
Non-Standard Asset Annual Fee	£315.00
Annual Fee Transfer Out Fee	£645.00

Contact us



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Morgan Lloyd SIPP Services Limited (Registered in England company no. 06679257) and Morgan Lloyd SIPP Trustees Limited (Registered in England company no. 08482560) whose registered office is The Pavilions, Eden Park, Ham Green, Bristol BS20 0DD.

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