

Contact Us:



Morgan Lloyd SIPP Services Limited

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

T: 01275 379 222

E: mlhartley1@morgan-lloyd.co.uk

For more information, why not visit our website:

W: www.morgan-lloyd.co.uk



**OUTLOOK SIPP
MENU OF CHARGES**

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.

Morgan Lloyd SIPP Services Limited is authorised and regulated by the Financial Conduct Authority (FRN 516447)



MORGAN
LLOYD[®]

OUTLOOK SIPP TRUSTEE AND ADMINISTRATION SERVICES

SCHEME ADMINISTRATION	
Establishment Fee	All Clients
Establishment Fee	£450.00
Annual Fees	Advised Clients Non Advised Clients
Annual Administration Fee	£1,140.00 pa £1,565.00 pa
<i>Collected annually in advance, or</i>	
<i>Collected monthly by Direct Debit</i>	£ 110.00 pm £ 150.00 pm
Drawdown Fees	All Clients
Benefit Crystallisation Calculation	£335.00
Annual Income Drawdown Fee	£335.00
Payment of Death Benefits or Pension Sharing Order	£335.00
Review of Pension Income	£125.00
Transaction and Transfer Out Fees	All Clients
UK Commercial Property	£1,025.00 Purchase / Transfer In £540.00 Sale / Transfer Out
Facilitation of Mortgage Borrowing	£400.00
Annual non panel insurance policy fee	£180.00
Annual Property Fee	£360.00 one property £120.00 each additional property
New tenant fee (first tenant free)	£175.00
Manual VAT return filing	£ 25.00 per return
Partial exemption VAT calculation	£125.00 per return
Arrears handling fee	£ 50.00 monthly
Liquidation claim submission	£420.00
Non Standard Asset Purchase Fee	£650.00
Non Standard Asset Annual Fee	£300.00
Transfer Out Fee	£605.00

All fees are subject to VAT.

Fees correct as at January 2024