


Fee Structure and Service Levels

	Service	Typical Fee
ABSOLUTE SERVICE 	<p>Coordination of a clients total net worth to objectives. Includes risk assessment, liquidity planning, overlay management and generational planning. Liaison with other professional advisers and oversight of trust arrangements and tax planning.</p> <p>The Absolute Service is the process we use to identify, achieve and maintain your desired future lifestyle.</p>	
	Individual Financial Plan Fee	Up to £1,750 (Offset against implementation fee and client & portfolio management service fee if applicable)
	Implementation Fee	4%
	Client & Portfolio Management Service Fee Annual rebalancing and review Six monthly review and valuation	1%
OAK SERVICE	Matching of financial arrangements with agreed objectives. Can be comprehensive or limited to specific areas such as retirement planning or risk management.	
	Implementation Fee	4%
	Client & Portfolio Management Service Fee Annual review Six monthly valuation	1%
ACORN SERVICE	Limited to specific area of advice (investment, tax planning, retirement)	
	Implementation Fee	4%
	Annual Oversight Fee	0.5%

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Squirrel Wealth Management Ltd is authorised and regulated by the Financial Services Authority.

