

# SIPP FOCUS FEE TARIFF

SIPP Focus is proving its value as a most 'personalised' personal pension. Since our business was formed in the early 80's we have been specialists in the area of Self Invested Pensions.

Some SIPP providers only offer SIPP administration and will insist upon advice being provided by a separate financial advisor.

In comparison Boolers provide a rounded service in terms of the administration and consultancy. For clarity and ease of comparison, we have separately listed the administration and advice elements of our SIPP fee tariff.

## SIPP Focus - Establishment of the plan

|                            |        |
|----------------------------|--------|
| SIPP set up administration | £630   |
| Advice element             | £880   |
| Total                      | £1,510 |

## SIPP Focus - Annual Fee

|                             |        |
|-----------------------------|--------|
| SIPP ongoing administration | £630   |
| Advice element              | £460   |
| Total                       | £1,090 |

These Standard fees include the following:

### Personal Support

- Financial Planner: Technical advice and annual review meetings
- SIPP Administrator: Ongoing SIPP maintenance

### Administration and Compliance Duties

- The provision of documentation - fully compliant with the Revenue requirements
- Initial and ongoing funding calculations
- Record keeping
- Tax reclaims on contributions
- Statutory Returns
- HMRC requirements for submission of information (e.g. event reporting)
- In-house banking facilities and specialist investment advice
- Retirement planning

Where special work is undertaken we have a separate fee tariff for specific tasks. These can be found on the following page.

Investment Advice is subject to our standard fee tariff.

All fees are subject to VAT and will be taken directly from the SIPP funds.

Fees are subject to periodic review.

## Special Work Fee Tariff

**If you have a particular project in mind and would like an indication of the likely time cost fees, please contact us on 0116 240 7070.**

|   |                               |
|---|-------------------------------|
| Establishing 2nd SIPP   | £150                          |
| Annual Administration charge for 2nd SIPP   | £150 per annum                |
| Property purchase (in addition to fees of solicitors, surveyors etc)  | Time cost (minimum £1,000)    |
| Property Development  | Time cost                     |
| Annual property fee (charged per property)  | £310                          |
| Lease Renewal (per lease)   | £310                          |
| Borrowing (in addition to fees of bank, solicitors etc)   | £515                          |
| Arrangement of benefits   | £620                          |
| Recalculation of capped drawdown limits/FAD Conversion  | £515                          |
| Payment of income drawdown (payroll services)   | £185 per annum                |
| Ad-hoc Pension Payment (paid not on usual monthly pension date)   | £260                          |
| Transfers in  | Time cost (minimum £470)      |
| Transfers out   | NIL                           |
| Administration involved with VAT registration of SIPP<br>(we do not complete or provide advice regarding the registration, but can suggest an accountant to assist) | £240                          |
| Opening and operating an additional bank account  | £70 to open and £70 per annum |
| Any other special work  | Time cost                     |
| If an external financial advisor is used  | Time cost                     |

Fees for property purchase where the property is a shared investment between two or more members are chargeable per property. Similarly any shared service between members will be charged at the appropriate rate for the service and divided as a cost between the members.

Time cost rates are detailed on our website [www.boolers.co.uk](http://www.boolers.co.uk), under Resources.

### A summary of the benefits of SIPP Focus are:

- Transparency of fees
- Wide range of investment opportunities
- The ability to purchase commercial property and land
- Significant tax advantages

For further information please contact Boolers on 0116 240 7070 or visit our website: [www.boolers.co.uk](http://www.boolers.co.uk)

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