



Pension Case Study...

IFA Client A contacted Precision Paraplanning for assistance with a pension switch case:-
The switch of two personal pensions, amounting to £300,000, to a new SIPP with DFM.

What Precision Paraplanning did?

After requesting the initial fact find, case notes and access to the existing pension statements online, we were able to provide within 5 working days;

- Selectapension report for price comparison
- Defaqto research filter report for the new SIPP
- Completed FSA pension switching template
- Full research on existing plans to provide adequate justification for the transfer
- Personal Illustration & KFDs for file
- A fully compliant Suitability Report in line with our clients network compliance rules

What was the benefit?



Total adviser income = £6000 fee and 0.5% ongoing adviser charging

Total paid to Precision Paraplanning = £300
(a tax deductible business expense)

Total hours saved by the adviser = 6 hours *

* Time to spend generating additional business, meeting with clients and honouring existing service agreements

Take the first step towards a more profitable
business, contact us today

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Professional Outsourced Paraplanning Services