

Walker Crips SSAS Small Self Administered Pension Scheme standard tariff

Standard fees (all charges below are subject to VAT)

New SSAS set up fee	£1,375
<ul style="list-style-type: none">New - To establish a Self Administered Scheme, including legal documentation, setting up a Trustee bank account¹, and registration of a scheme with HMRC, Pension Regulator and Information Commissioner's Office.	
Existing SSAS set up fee	£1,250
<ul style="list-style-type: none">Existing - Appointment as Professional Trustees and Scheme Administrator to an existing SSAS, including preparation of documentation, re-registration of standard assets, and updating HMRC, Pension Regulator and Information Commissioner's Office.	
Annual fee payable by quarterly installments in advance	£1,375 (£1,250 if WCIM investment portfolio only)
<ul style="list-style-type: none">Annual fee - For Professional and Scheme Administration Services in respect of a scheme with two members which include: all HMRC reporting requirements, basic record keeping, an annual investment valuation, one annual Trustees meeting, general advice on pensions regulations and signing all relevant documentation.	

Fixed fees do not apply to some areas of work as the time spent can vary considerably. These can include more complex and time consuming transfers, complicated and larger payments with clients, detailed correspondence or meetings with other professional advisors. Our standard rate for this type of work is £150 per hour.

¹Our preferred Trustee bank account is with Cater Allen. If a different provider is required, there will be a £200 per annum administration charge.*

Additional charges to the standard fee

Additional charges will be levied from the fund for various other transactions and provided on an individual scheme basis (please see overleaf).

Additional ongoing fees (marked with an *) will be charged quarterly in advance. Other fees will be invoiced separately.

The SSAS may also pay fees to any professional advisor you use e.g. to manage your investments. Such charges will be agreed with the advisor.

Walker Crips Pensions

Apollo House, Eboracum Way, York YO31 7RE | 01904 544312 | [walkercrips.co.uk/pensions](mailto:ssas>wcgplc.co.uk | <a href=)

Walker Crips Pensions is the trading name of Ebor Trustees Limited which is authorised and regulated by the Financial Conduct Authority (FRN: 462002). Registered in England and Wales number 3514268

Walker Crips SSAS Small Self Administered Pension Scheme standard tariff

Scheme and member administration fees (all charges below are subject to VAT)

Annual Member charge* (where more than two members)	£100 for each additional member
Establish/process a deposit/cash/investment account incl. NS&I	£150 each
Provision of new governing Trust Deed (other than establishing Deed)	£375
Appointment, removal or change of principal or participating employer	From £250
New member documentation	From £150
Transfer in and out:	
Cash transfers in (in excess of an initial two per member)	£60
Transfers in (where the fund is capped/flexi-access drawdown)	£150
Transfers in/transfers out (in specie)	Time cost
Transfers out/payment of all remaining fund paid via flexi-access drawdown	£300
Establishment of the following:	£150 per trigger event
Flexi-access drawdown	
Additional fund designation	
Conversion to flexi access drawdown	£100
Regular income payments and PAYE	£200 p.a.
Ad-hoc income payments and PAYE per payment including uncrystallised funds pension lump sum	£150 each
Reviewing drawdown maximums	£150
Fund allocation calculations	From £200
Payment of death benefits	Time cost (subject to a minimum of £500)
Work involved in divorce cases	From £500

Walker Crips Pensions

Apollo House, Eboracum Way, York YO31 7RE | 01904 544312 | ssas@wcgplc.co.uk | walkercrips.co.uk/pensions

Walker Crips Pensions is the trading name of Ebor Trustees Limited which is authorised and regulated by the Financial Conduct Authority (FRN: 462002). Registered in England and Wales number 3514268

Walker Crips SSAS Small Self Administered Pension Scheme standard tariff

Property and borrowing fees (all charges below are subject to VAT)

Property purchase	Time cost (subject to a minimum of £650)
Bank Mortgage	From £350
New Lease or amendment	From £300
Annual administration charges:	
- Commercial property holding and administration charge*	£400 p.a.
- For each additional commercial property holding and administration charge*	£150 p.a.
- Property holding charge only*	£150 each p.a.

Please note we may charge an additional fee where a property has more than one tenant

Commercial property sale	Time cost (subject to a minimum of £600)
VAT registration charge	£250
VAT de-registration	£150
VAT returns*	£100 per return

Walker Crips Pensions

Apollo House, Eboracum Way, York YO31 7RE | 01904 544312 | ssas@wcgplc.co.uk | walkercrips.co.uk/pensions

Walker Crips Pensions is the trading name of Ebor Trustees Limited which is authorised and regulated by the Financial Conduct Authority (FRN: 462002). Registered in England and Wales number 3514268

Walker Crips SSAS Small Self Administered Pension Scheme standard tariff

Scheme loans and share transactions (all charges below are subject to VAT)

Provision of new loan	£500
Roll over loan	£200
Annual monitoring of loan repayments*	From £200
Acquisition of unlisted shares	£500 each

General administration events (all charges below are subject to VAT)

Preparations of Annual Financial Statements*	£300
Completion and submission of triennial return to the Pensions Regulator	£120 per return
Ad-hoc valuations	£100 each
Non-standard Investments research and due diligence	From £150 per investment

Other work (all charges below are subject to VAT)

Consultancy and ad-hoc administration services	Time cost
Wind up of scheme	From £500
Provision of information to third parties	From £100
Replacement of Ebor as Professional Trustee, Co-Signatory and Scheme Administrator	From £300

Walker Crips Pensions

Apollo House, Eboracum Way, York YO31 7RE | 01904 544312 | ssas@wcgplc.co.uk | walkercrips.co.uk/pensions

Walker Crips Pensions is the trading name of Ebor Trustees Limited which is authorised and regulated by the Financial Conduct Authority (FRN: 462002). Registered in England and Wales number 3514268