



Alexander Forbes Trustee Services Scale of Fees

The effective governance of an occupational pension scheme relies upon a combination of skills, experience and robust systems. Alexander Forbes Trustee Services is a team of pension professionals that has been at the forefront of providing specialist pension services for over 20 years.

The systems and procedures used by the team have been developed and refined over the years and enable us to provide services at very competitive rates.

Where we are appointed as independent trustee we will charge on a time-spent basis in accordance with the scale of fees given below. In some circumstances the charges will be made to the scheme itself, rather than to the sponsoring employer.

We appreciate the need for, and our experience enables us to provide, an assessment of the likely cost of assisting with a scheme, based upon its specific circumstances. For specific exercises it may be appropriate to agree a fixed fee.

If you wish to discuss our services and the way in which Alexander Forbes Trustee Services can act as your guide through the pensions maze, please telephone 0115 941 1031 and ask to speak to one of our Directors.

ACTIVE PARTY	HOURLY RATE
Director	£226.00
Associate Director	£201.00
Lead Trustee	£201.00
Consultant	£185.00
Supervisor	£185.00
Senior Case Handler	£161.00
Case Handler	£129.00
Clerical support	£77.00

All charges are subject to VAT at a rate of 15% and are reviewed in March each year.

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