FINANCIAL ADVISORY LAUNCH PROGRAMME · SET YOUR CHARGING MODEL

Fee schedule and fair-value one-pager

Your initial and ongoing charges, what each buys, and a worked client example.

01 Your initial charge

How you charge for initial advice and implementation (a percentage, a fixed fee, hourly)

The number, and a worked example on a typical case

02 Your ongoing fee

Under Consumer Duty the fee must map to a real, delivered service.

Your ongoing service fee (e.g. 0.5, 0.75 or 1 percent a year)

The specific service it buys, at minimum an annual suitability review

03 Your fee schedule

The one-page schedule a client can read and understand

PREFER THIS DONE FOR YOU?

Want your fees laid out clearly on your website?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us