FINANCIAL ADVISORY LAUNCH PROGRAMME · OPEN A BUSINESS ACCOUNT AND SEPARATE YOUR MONEY

Launch cost and cash-runway worksheet

Every fixed cost from these modules in one place, with a break-even estimate.

01 Your fixed monthly costs

The recurring lines from these modules. Costs are indicative, so use your own quotes.

Professional indemnity insurance (monthly or annual, from your quote)

Software stack: back office, research, cashflow, portal

Network or compliance fees, if you take the AR route

Bank account fees, ICO fee, and any subscriptions

02 Your one-off setup costs

The costs you pay once to get the firm running.

Qualifications, exams and any gap-fill (see Get Authorised)

Brand and website build

Capital you must hold if directly authorised (money that stays in, not a cost)

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03 Your break-even

Total fixed cost a month

Average ongoing fee per client, and clients needed to break even

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