# Financial Planning: Inheritance Tax Planning Service Schedule of Charges

Redmayne Bentley

This document provides the charges for our Inheritance Tax Planning Service provided by Redmayne Bentley. It also explains the services we provide in return for those charges.

**Restricted Advice**
Our advice is restricted, meaning we advise on a limited range of products, services and providers that we have carefully selected. A list of the products and providers we offer is available upon request.

**Engagement Meeting**
We offer an initial discussion with no cost and no obligation. This meeting allows you to meet your Financial Planner and for us to understand how we may be able to add value to your inheritance and estate planning needs, before you decide whether to proceed.

**What will you have to pay us for the Inheritance Tax Planning Service?**
You will pay for the services outlined in this document based on an adviser charge, as detailed below.
We will not charge you until we have agreed with you how we are to be paid and when payment will be due. All charges are confirmed in writing in a Service & Payment Agreement before any chargeable work begins.

**The Cost of Our Services – Initial Review**

**What We Will Provide**
Our Inheritance Tax Planning Service consists of a comprehensive Estate & Inheritance Tax Assessment and Options Report. This will include:

- Obtaining full details of your assets, liabilities, income, expenditure, existing wills and estate planning arrangements
- Assessing your potential IHT exposure under current legislation and known future changes
- Identifying gaps, risks or unmet estate planning needs
- Providing a factual Options & Opportunities overview of potential IHT planning strategies, including gifting, trusts, protection and tax-efficient investments
- A written report setting out our findings and considerations

No personal recommendations or product selection are made at this stage.

**Initial Review Fee**

**Fixed fee: £500 + VAT**

This fee covers the full assessment and delivery of your personalised Estate & Inheritance Tax Assessment and Options Report and is payable on completion of the report.

**You may decide not to proceed beyond the initial review. However, should you decide to proceed with Estate Planning Advice, this will involve your Financial Planner providing personal recommendations and will follow our standard Advice Charges as laid out in our *Financial Planning Schedule of Charges* provided separately.**

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