

Schedule of Fees

Remuneration Policy

Wealth Alliance Ltd is a fee based financial planning firm that provides clients with the option to either pay by a fee, commission off set or a combination of both. Wealth Alliance Ltd will agree the basis of payment with clients before work commences.

Fee Option

Our fees will be based on a combination of time needed to complete the required work, the complexity of the case and the specialist knowledge required. Wealth Alliance Ltd will agree the amount or basis of our invoices with clients in advance.
Fees may be subject to VAT.

Commission

Wealth Alliance Ltd may be remunerated by commission earned from insurers and product producers to whom orders are transmitted. Summary details of these payments will also be included in a product information document which you will receive before an application form for a product is completed, and extended details will also be included with your cooling-off letter. Any additional charges for services rendered will be clearly disclosed to the client in writing prior to the provision of a service.

If we have arranged for your fee to be offset by commissions derived from a product which you subsequently cancel or cease to pay, and in consequence we are obliged to refund commissions paid to us, we reserve the right to charge you a fee to reimburse us for the amount of commission refunded.