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**SSAS Practitioner Service  
Schedule of Fees**

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## Schedule of Fees

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This schedule sets out the fees charged by Vintage SSAS Services Ltd. for setting up and operating a SSAS (small self administered scheme).

The purpose of this document is to enable you to have clear information concerning the costs which may be incurred for utilising our services.

### It is important to note:

1. The fees for any services provided that are not listed below will be charged on the basis of time charges.
2. All the fees detailed in this document will be reviewed on each 1 January.
3. VAT is chargeable on all the fees set out below.
4. Time charges will be based on the hourly charge-out rate of the individuals providing the services, which are currently £125 per hour for a Technical Administrator and £350 per hour for a Director.
5. We will also charge for any expenses, including legal expenses, disbursements, taxes and any other costs, that we may incur in connection with the provision of these services.
6. We reserve the right to charge interest if our fees are not paid within thirty days of being invoiced.
7. The trustees will also be required to pay the annual data protection fee to the Information Commissioner's Office and, if applicable, the annual general levy charged by The Pensions Regulator.

### A. Standard fees and services

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|--|--------------------------------|
| Setting-up a new SSAS                        | £1250 plus £250 per member     |
| Taking over an existing SSAS                 | £750 or time charges if higher |
| Annual fee for the standard ongoing services | *£1000 plus £250 per member    |

\*Subject to increases for more complex cases. Payable at the beginning of each scheme year.

### Standard ongoing services

- / Acting as the Scheme Practitioner of the pension scheme for HMRC purposes.
- / Acting as a signatory to the pension scheme's bank account and monitoring the account.
- / Providing advice on any technical, administrative or other queries that may arise on a day-to-day basis.
- / Assist with compliance on all relevant HMRC and any other regulatory/statutory requirements.
- / Maintaining and updating the pension scheme's membership records.
- / Providing an annual scheme summary.
- / Submitting annual Registered Pension Scheme Returns and any other returns or reports required by HMRC in relation to the pension scheme.
- / Providing generic advice on benefits payable under the pension scheme.
- / For scheme's with more than one member:
  - Maintaining and updating records of the fund apportionment between the members.
  - Submitting triennial Scheme Returns to The Pensions Regulator.

**Note that the standard ongoing services do not include acting as the Scheme Administrator for HMRC purposes, or as a trustee of the pension scheme, and does not include the following:**

- / Preparing annual accounts of the pension scheme.
- / Arranging and operating a PAYE scheme in relation to drawdown payments, although we can arrange for this, at additional cost, if required.

## B. Non-standard fees and services

Services not covered by the standard ongoing services are subject to additional fees as set out below.

|   |   |
|---|---|
| <b>Meetings:</b><br>Attendance at meetings in relation to the pension scheme.   | Time charges.   |
| <b>Annual accounts:</b><br>The trustees are responsible for arranging for annual accounts of the pension scheme to be prepared and for paying the accountancy fees. | Accountancy fees.   |
| <b>Corporate restructuring</b><br>Advice on the implications of any changes in a sponsoring employer's corporate structure.   | Time charges.   |
| <b>Benefit crystallisations:</b><br>Arranging for benefits, including tax-free lump sums, to be paid.   | £250  |
| <b>New member:</b><br>Adding a new member of the pension scheme.  | £250  |
| <b>Investments:</b><br>Assistance on property purchases or new loanbacks to a sponsoring employer.<br><br>Any other advice in relation to investments.              | £750 per transaction or time charges if higher.<br><br>Time charges |

Separate fees are payable to professional advisers in connection with commercial property transactions, or loanbacks for example, solicitors, surveyors and agents as well as stamp duty and other disbursement costs.



The information contained within this communication does not constitute financial advice and is provided for information purposes only. Vintage SSAS Services Ltd is a company registered in England and Wales No. 12633538.

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