



## Schedule of fees/commission charges

### Fees

Group Pension Schemes	Case by case basis but generally: Initial Set Up Charge: Up to €950 Annual Maintenance: Maintenance fee of €1,500 per annum plus servicing fee of up to €75 per member per annum Fund based commission: 0 – 0.5% per annum
Small Self Administered Pension Schemes (SSAPS)	SSAPS Set-Up Fee : €1,850 Annual Maintenance to be agreed on case by case basis
Pensions/Investment Advice & Reviews	€150 per hour standard rate
Protection Policy Claim Handling Fees	€50 per hour standard rate
Overall Financial Review	€150 per hour standard rate
Corporate Advisory	€150 per hour standard rate
Residential Mortgage & Re-mortgaging	Upfront fee €295 plus agreed fee if no commission Final fee agreed on a case by case basis at €50-€150/hr
Personal Tax and Tax Planning	Income Tax Return Submission: €250 - €750 per Return depending on complexity

### Tri Everest Wealth Management Ltd

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## Commission

Pensions Group Scheme, Executive, Personal, PRSA	<p>Regular Contributions:            Level Commission Model: Up to 5% of annual contribution            Initial &amp; Renewal Commission Model: Up to 25% of annual contribution &amp; annual renewal &amp; commission of up to 5% may also apply</p> <p><i>Fund based commission:</i> Up to 1% per annum  <i>Single Contributions:</i> Up to 5% of contribution  <i>Fund based commission:</i> Up to 1% per annum</p>
Annuity / Buy Out Bond	<p>1% - 5% of amount invested on case by case basis            Fund based commission: Up to 1% per annum</p>
ARF / AMRF's	<p>1% - 5% of amount invested on a case by case basis            Fund based (annual review) commission: Up to 1% per annum</p>
Protection Term Assurance, Mortgage Protection, Specified Illness, Income Protection, Group Risk	<p>Term Assurance, Mortgage Protection, Specified Illness &amp; Income Protection up to 130% of annual premium &amp; annual renewal commission may also apply            Group Risk: Between 6% and 12.5% of annual premium on a case by case basis</p>
Investment Bonds	<p>1% - 5% of amount invested on a case by case basis            Fund based (annual review) commission: Up to 1% per annum</p>
Regular Savings Plans	<p>Up to 25% of annual premium &amp; annual renewal commission of up to 5% may also apply            Fund based commission: Up to 1% per annum on a case by case basis</p>
Deposits	<p>0.2% of deposit amount</p>
Structured Investment Products	<p>Up to 5% of amount invested (usually built into product pricing structure)            Fund based commission: Up to 1% per annum on a case by case basis or fee</p>
Residential Mortgages & Re-mortgaging	<p>Upfront fee €295 per application            1% of loan amount subject to minimum €1,000. Balance payable by client.</p>

\* Client always has the option to pay a fee only, thereby ensuring initial commission is waived. In some cases a combination of fee and commission may be agreed on a case by case basis.

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