



## Schedule of fees/commission charges

### Fees

Group Pension Schemes	Case by case basis but generally: Initial Set Up Charge: Up to €1,050 Annual Maintenance: Maintenance fee of €1,750 per annum plus servicing fee of up to €95 per member per annum Fund based commission: 0 – 0.5% per annum
Small Self Administered Pension Schemes (SSAPS)	SSAPS Set-Up Fee : €2,100 Annual Maintenance to be agreed on case by case basis
Pensions/Investment Advice & Reviews	€95 - 160 per hour
Protection Policy Claim Handling Fees	€95 per hour standard rate
Overall Financial Review	€160 per hour standard rate
Corporate Advisory	€160 per hour standard rate
Residential Mortgage & Re-mortgaging	Upfront fee €485 plus agreed fee if no commission Final fee agreed on a case by case basis at €95-€160/hr
Personal Tax and Tax Planning	Income Tax Return Submission: €350 - €750 per Return depending on complexity

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## Commission Charges payable

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	N/A
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 €485 per application                      1% of loan amount subject to minimum €1,500. Balance payable by client.</p>

\* Client 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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