

DEFINED BENEFIT TRANSFER SERVICE

KEY BENEFITS FOR INTERMEDIARIES:-

- Specialists in Defined Benefit Transfer advice with significant experience of completing over 600 transfers from £200,000 to £8.5m.
- Dedicated team of specialist advisers and personalised advice
- All compliance for advice borne by Tideway Investment Partners LLP
- Free initial assessment for each case
- Case suitability based on:
 - An holistic view of the member's financial situation and objectives
 - Relative value of the offer based on drawdown return targets rather than annuity purchase critical yields (TVAS)
- In-depth transfer report, in plain English with clear charts and tailored to each individual's circumstances, objectives and plans rather than a standardised computer generated report.
- Integrated investment solution using our Horizon model portfolio service.
- Comprehensive dedicated website for members and intermediaries to view guidance with case studies.
- Free 30 page guide to Defined Benefit Transfers
- Our fees for the intermediary service are:
 - Minimum Fee £2,000
 - 1% on transfer values for £200,001 and above, capped at £20,000.
 - All fees are VAT exempt and only payable on transfer proceeding and completing
- Using a specialist firm for Defined Benefit Transfer advice could reduce your PI cover costs and gives you more time to advise in other areas of financial planning