

What to Know About Our Fees.

Nobody likes unexpected charges, especially when planning for the future, so this guide explains the potential costs you might encounter when working with us on your retirement and estate planning.



The Fees You Might Pay...

Service	What This Covers	Included Services	How It's Charged	When You Pay
Financial Planning Fees	Crafting a personalised financial plan to ensure your money lasts.	Lifestyle and goal setting, cash flow modelling, and financial advice.	Flat fee.	Upon completion of your Financial Plan.
Estate Planning Fees	Protecting and distributing your assets according to your wishes.	Will writing, Trust planning, Inheritance Tax strategies, and setting up a Lasting Power of Attorney.	Flat fee for each document prepared.	Upon successful completion and filing of estate planning documents.
Investment Management Fees	Managing your investments.	Portfolio design, risk assessment, rebalancing, and oversight.	0.30% per annum of assets under management.	Monthly, pro rata, from funds under advice.
Platform or Custodian Fees	Using the PlanHappy Platform to hold your investment assets.	Account maintenance, investment administration, transaction execution, and security.	From 0.27% per annum of assets under management.	Monthly, pro rata, from funds under advice.
Fund Manager Charges	Running costs of investment funds like unit trusts and ETFs.	Managing and administering the fund.	Percentage of funds under advice - varies depending on investments.	Monthly, pro rata, from funds under advice.
Trading & Transaction Fees	Buying and selling investments.	Broker charges, fund dealing fees, and foreign exchange costs.	Per-trade fee or a percentage of the trade value.	At time of trade.

How We're Bringing the Happy to Teesside...

Real Stories, Real Happiness - Hear from some of our clients who've turned their retirement dreams into reality.



JOE & LORRAINE
FROM HARTLEPOOL

Joslin Rhodes
has made us happy,
because we're able to
do the things
we want.



JIM & JANIS
FROM NORTHALLERTON

We can
sleep easy at
night, thinking
no more money
worries.



NEIL & FIONA
FROM INGLEBY BARWICK

We were told,
Neil, you don't have
to go back to work,
and Fiona, you can
retire tomorrow.

CLICK HERE
TO WATCH
OUR CLIENT
TESTIMONIALS

[Client Testimonials](#)

Have Questions?..

Our Financial Planners will always explain our costs to you and make sure you fully understand and agree to them before we proceed with any services.

If you still have questions though about our fees or services, just let us know.

We're here to help!

Call: 01642 52 55 11

Email: advice@joslinrhodes.co.uk

Click: joslinrhodes.co.uk

Visit: Joslin Rhodes, The Planning Rooms,
Preston Farm, Stockton on Tees, TS18 3TA

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- FRIENDLY
- ADVICE,
THAT'S DONE
REET! -
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**Happy Retirements
Made in Teesside.**

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