



Schedule of Fees & Charges

Fees may be charged on an hourly rate. This will always be discussed and agreed in writing with the client in advance of the provision of service or inception of any policy.

Professional Advisor	Professional Fee (Hourly Rate Ex VAT)
Certified Financial Planner	€200.00
Accounts Executive / Qualified Financial Adviser	€150.00
Support Staff	€80.00

- The basic hourly rate as outlined may be subject to change should additional factors arise (i.e. level of risk and complexity, urgency of transaction). This will always be discussed and agreed in advance of transactions being placed.
- Professional Fees are non-refundable in the event that a policy is cancelled.
- Fees are payable within fourteen days of receipt of the invoice.

Infinity Financial Planning Limited may be remunerated by commission earned from insurers and product providers to whom orders are transmitted, for new business and /or based on quality of business introduced. Summary details of these payments will be included in a product information document which you will receive before an application form for a product provider is completed and extended details will also be included with your cooling-off letter.

Or

Fees may be charged as a percentage of the transaction value, the precise rate of which will be outlined to the client in advance of the execution of the transaction. The fee payable can be invoiced directly to the client or alternatively charged as a commission built into the product charging structure.

Lifestyle Financial Planning Service:

We provide comprehensive Lifetime Cash-flow 'Financial Master Plans'. Where a client seeks such a Financial Master Plan, a consultancy fee of up to €150 per hour, with a minimum fee of €1,500, applies.

Last Minute AVC Service:

We can arrange a Last Minute AVC (where the client makes a lump sum contribution into a PRSA AVC in the preceding months to their retirement). No commission will apply on this contribution as we charge a flat fee for the advice instead. The once off fee for this service is €400.

PRSAs:

Where advice is requested for PRSAs, the above hourly fees will apply. Alternatively, we may charge a once off fee for this service of €400.

- Where we receive a commission this can be offset against any fee payable.

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This is a list of fees and charges for Infinity Financial Planning Limited Product Provider. Third Party and Government charges may also apply.
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