



root

Fee Schedule & Services – 2026.

1. Paraplanning Services:

	Enhanced	Foundation	Pay-as-you-go
Pension Switch / Consolidation Reports (Including 3 Pensions):	£243	£257	£270
Each Additional Pension:	£68	£71	£75
Investment Transfers / Consolidation Reports (Including 3 Investments):	£189	£200	£210
Each Additional Investment:	£54	£57	£60
Drawdown Report:	£270	£285	£300
New Pension / Investment Report:	£207	£219	£230
Existing Pension or Investment Contribution / Withdrawal Report (Per Wrapper):	£104	£109	£115
Bed & ISA / Rebalance / Fund Switch:	£104	£109	£115
Annual Review Letter:	£117	£124	£130
Mortgage Report:	£198	£209	£220
Annuity Report / Protection Report:	£176	£185	£195
Cashflow Forecast Report*:	£180	£190	£200
New EIS / SEIS / VCT (Per Wrapper):	£189	£200	£210
Report Amendments (First Amendment Free If Advice Unchanged): Per Hour	£68	£71	£75
Additional Services / Pre-Planning (Calculations / Research): Per Hour	£68	£71	£75

*50% Discount if a simplified Cashflow Forecast/income sustainability is requested as part of a Drawdown Report.

2. Administration Services:

Enhanced
Foundation
Pay-as-you-go

	Enhanced	Foundation	Pay-as-you-go
Illustrations (Each Plan):	£36	£38	£40
Letter of Authority (Each Plan):	£27	£29	£30
Data Harvest / Plan Information Collation (Each Plan):	£36	£38	£40
CRM / Back-Office Data Entry: Per Hour	£50	£52	£55
Meeting Pack Generation / Document Preparation: Per Hour	£50	£52	£55
Chasing Providers / Telephone Follow-ups: Per Hour	£50	£52	£55
Additional Services / Ad-Hoc Administration Services: Per Hour	£50	£52	£55

3. Compliance services:

Enhanced
Foundation
Pay-as-you-go

	Enhanced	Foundation	Pay-as-you-go
File / Case Reviews: Per Hour	£90	£95	£100
Consumer Duty Audit: Per Hour	£90	£95	£100
Process / Checklist / Report Templates: Per Hour	£90	£95	£100
Centralised Investment Proposition: Per Hour	£90	£95	£100
Centralised Retirement Proposition: Per Hour	£90	£95	£100

Our pricing options

Root offers three pricing options, catering to advisers with varying needs.

Pay-as-you-go

We offer a simple pay-as-you-go service, with no upfront or ongoing costs:

Under this option, you will only pay for the service completed during any given month. At the end of the month, we will send you an invoice for the cases completed. We aim to review cases under this option within **2 working days**, with final reports provided within **5 working days**.

Foundation

The **Foundation** retainer is our entry-level service designed to provide reliable, ongoing operational support.

- **Monthly Cost:** £500
- **Service Inclusion:** This retainer covers services up to the value of **£500** each month. Services exceeding this value will be invoiced separately.
- **Retainer Benefit:** You receive a **5% discount** across all of our listed services.
- **Service Commitment:** We aim to finish case reviews within **2 working days**, with final reports delivered within **4 working days**.

Enhanced

The **Enhanced** retainer is our premium service tier, providing the most comprehensive, reliable, and strategic ongoing operational support for your business.

- **Monthly Cost:** £1,000
- **Service Inclusion:** This retainer covers services up to the value of **£1,000** each month. Services exceeding this value will be billed separately.
- **Retainer Benefit:** You receive our highest saving—a **10% exclusive discount** across all of our listed services.
- **Service Commitment:** We offer priority turnaround for our retained clients: Case reviews finished within **1 working day**, with final reports delivered within **3 working days**.