



SELECTAPENSION
PRICESHEET 2022

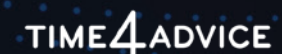
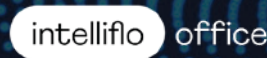




Selectapension offers various packages that include multiple tools that falls on individual areas for the advisors.

- Award winning customer service and training
- Morningstar funds research, X-Rays and Portfolio Comparison
- Bespoke funds with past performance charts/graphs
- Bespoke plans and workplace pensions on all tools
- Live telephone in-case support Mon-Fri and email support (response within 2 hours)
- AKG downloadable with profits and Company profile reports
- Sustainable Drawdown and State Pension Modelling
- Branding of reports (font/logo/colours)
- Full Word functionality and PDF secure reports

INTEGRATIONS



COMING JAN 2022

**SWITCHING
PACKAGE**

Pension Switching

Investment Switching

Drawdown Switching

New Pension Projections

New Investment Projections

Portfolio Comparison

Morningstar Funds

AKG With Profits data

1 USER

£50.00 Inc.VAT per month

**SWITCHING PLUS
PACKAGE**

Pension Switching

Investment Switching

Drawdown Switching

New Pension Projections

New Investment Projections

Portfolio Comparison

Morningstar Funds

AKG With Profits data

Cashflow & Drawdown Strategies

Rapid Reviewer

2 USERS

£100.00 Inc.VAT per month

**ULTIMATE
PACKAGE**

Pension Switching

Investment Switching

Drawdown Switching

New Pension Projections

New Investment Projections

Portfolio Comparison

Morningstar Funds

AKG With Profits data

Cashflow & Drawdown Strategies

Rapid Reviewer

Defined Benefit TVAS

3 USERS

£170.00 Inc.VAT per month

**EXTRA USER
LICENCE**
£24.00 Inc.VAT per month

**STANDALONE
TOOLS**

Cashflow & Drawdown Strategies

£50.00 Inc.VAT per month

Defined Benefit TVAS

£100.00 Inc.VAT per month

QROPS

£50.00 Inc.VAT per month

 Additional Licence **£24** Inc.VAT per month

**SWITCHING
PACKAGE**

Pension Switching

Investment Switching

Drawdown Switching

New Pension Projections

New Investment Projections

Portfolio Comparison

Morningstar Funds

AKG With Profits data

1 USER

£500 +VAT per annum

**SWITCHING PLUS
PACKAGE**

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Investment Switching

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New Pension Projections

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Cashflow & Drawdown Strategies

Rapid Reviewer

2 USERS

£1000 +VAT per annum

**ULTIMATE
PACKAGE**

Pension Switching

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Defined Benefit TVAS

3 USERS

£1700 +VAT per annum

**EXTRA USER
LICENCE**
£240 +VAT per annum

**STANDALONE
TOOLS**

Cashflow & Drawdown Strategies

£500 +VAT per annum

Defined Benefit TVAS

£1000 +VAT per annum

QROPS

£500 +VAT per annum

 Additional Licence **£240** +VAT per annum