

Our service levels



At Finura, we are dedicated to providing fair value to our Clients and are committed to ensuring that the services we offer are commensurate with the fees we receive.

Our goal is to maintain transparency and fairness, consistently aligning our offerings with your expectations and needs. We believe in delivering quality service that justifies the ongoing costs, fostering a relationship built on trust and mutual benefit.

Finura

Where Finura manage assets of £210,000 to £999,999 for your family, our ongoing charge is 1% per annum. We will deliver:

- 1 proactive review meeting per annum
- Lifestyle & Cashflow modelling
- Nil charge for (re)investments to existing plans
- Nil charge for fund or portfolio switching
- Free Cash management
- Nil charge for family JISAs, JSIPPs or JGIAs
- Access to Finura professional network of Will writers and estate planners, mortgage brokers, FX brokers, accountants and more, plus project management as required

Finura Plus

Where Finura manage assets in excess of £1m for your family, our ongoing fees are 1% on assets up to £2.5m, reducing to 0.5% on assets above £2.5m and 0.25% on assets above £7m. We will deliver:

- 1 proactive review meeting per annum
- 1 additional review meeting by request
- Lifestyle & Cashflow modelling
- Nil charge for (re)investments to existing plans



- Nil charge for fund or portfolio switching
- Nil charge for at retirement advice, where required
- Nil charge for family JISAs, JSIPPs or JGIAs
- Nil charge for family ISAs, SIPPs or GIAs, where required*
- Nil charge for pension allowance(s) advice, where required
- Nil initial charges where assets under our management are above £4m**
- Free Cash management
- Access to Finura professional network of Will writers and estate planners, mortgage brokers, FX brokers, accountants and more, plus project management, as required

Transactional

For Clients who do not require ongoing service, Finura will not charge any recurring fees. Instead, all services provided will

be billed at our standard hourly rate.

* Family relates to the spouse and children of an existing Finura Client.

** Should the relationship cease within 2 years of the completion of work, Finura reserve the right to invoice at their standard hourly rate



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