

How do I set a flat rate of £1000 initial fee for an adviser?

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You can do this by setting up a new service level under **Contacts** and then **Service Levels**. Once you have set up the new service level, you can then go back to **Adviser Fees** and add the initial fee for this service level / group (If you want to have the same initial fee for both platform and off platform products, add the initial fees for both tabs)

Adviser Fees
Complete the table below to ensure your adviser fees are applied to the calculation. Regular fees are charged per premium per product for both on & off platform products. You can also limit the number of premiums to be charged by entering the number of premiums in the column. Click the icon to return to all.

Platform	Off Platform		
Product		Initial (£)	Initial (%)
All Platforms		Mixed	Mixed
Adviser Group 1		1000	0