

Fee tariff data

Regulatory fees and levies 2024/25

Fee-blocks A023 and I025 - funeral plan providers and intermediaries

FCA	Tariff base	Annual income - funeral plans
FOS	Tariff base	Relevant annual income – funeral plans
FCA/FOS	Valuation date	For financial year ended in the calendar year ending 31 December 2023

We need fees and levies information to calculate your fees for the Financial Conduct Authority (FCA) and the Financial Ombudsman Service (FOS). We provide separate guidance for data relevant to the [FSCS levies](#).

This guidance sheet provides details on the data to include within the firm's fee tariff data submission. We have given links to relevant parts of our Handbook to help you complete the form correctly. This sheet covers the following fee-blocks:

- **FCA fee-block A023**
- **FOS industry block I025**

For more information on this fee block, including which regulated activities place firms into fee-blocks, please refer to the fees manual ([FEES](#)). Please note that some firms may have been placed into this fee block due to legacy Funeral Plan Contract permissions that are no longer used. This might include dealing in investments related to funeral plan contracts, which in some cases will date back to the FCA's foundation in 2001.

If this applies to your firm, please contact the Supervision Hub to remove the permission. This must be done by **31 March 2024** in order to avoid the associated fees for 2024/25.

Each year we consult on any proposed fee policy changes and fee tariff bases may be subject to change. So before submitting the fee tariff data, you should also refer to the [latest publications](#) about fees on our website. These explain any proposed changes to the tariff data you must report, and the expected date when any changes will be implemented.

For FSCS guidance, publication and further information on fees and levies, visit our [fees webpages](#).

FEES AND LEVIES 2024/25 – REQUEST FOR FEE-TARIFF DATA

FCA fee-block: A023 – funeral plan intermediaries and providers

Tariff base: annual income for your financial year ended in 2023.

Annual income for all relevant fee-blocks is defined in [FEES 4 Annex 11AR](#). Guidance is set out in [FEES 4 Annex 13G](#).

FOS industry block I025: general insurance distribution

Tariff base: relevant annual income for your financial year ended in 2023

The FOS levy is based on business done with consumers and which is subject to the jurisdiction of the Financial Ombudsman Service (see [DISP 2.3](#)). Firms should only include income in relation to consumers. If the firm's entire funeral plan business is carried on with consumers, then the data you report here will be the same as that reported under fee-block A.23.

If the firm has a valid FOS exemption no data is required.

IMPORTANT

Firms registered for online invoicing must submit the data online; any completed paper forms should be emailed to feetariffreturns@fca.org.uk before the date shown on the front of your fee tariff data letter.

Before submission please ensure:

- FCA and FOS tariff data have been completed in whole numbers and are in GBP
- You have completed all sections
- Do not leave blanks (enter '0' when submitting on line or 'NIL' on the paper form, where applicable)
- The tariff data has been signed off at the appropriate level of seniority, for example the compliance director, before submitting to us

e-mail: feetariffreturns@fca.org.uk	Tel: 0300 500 0597	Mail: FCA - Revenue Dept. Tariff Data Collection 12 Endeavour Square London E20 1JN
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