



## Our Probate and Estate Administration Service

The prospect of dealing with a deceased's estate can be daunting, especially at what is often a very difficult time and many people worry about the costs involved in seeking legal advice and assistance.

## Our Probate and Estate Administration Team



### Finula Allen

Finula is a Director and is based at our office at *Stow on the Wold*. She is Head of the Private Client Department. She has more than 35 years post qualification experience and her hourly rate is £265.00 per hour plus VAT.



### Caroline Malings

Caroline is a Partner and is based at our office at *Moreton-in-Marsh*. She has over 15 years post qualification experience and her hourly rate is £265.00 per hour plus VAT.



### Gabrielle Renouf

Gabrielle is based at our *Bourton-on-the-Water* and *Winchcombe* offices. Gabrielle is a Chartered Legal Executive with 6 years post qualification experience and her hourly rate is £250.00 per hour plus VAT.



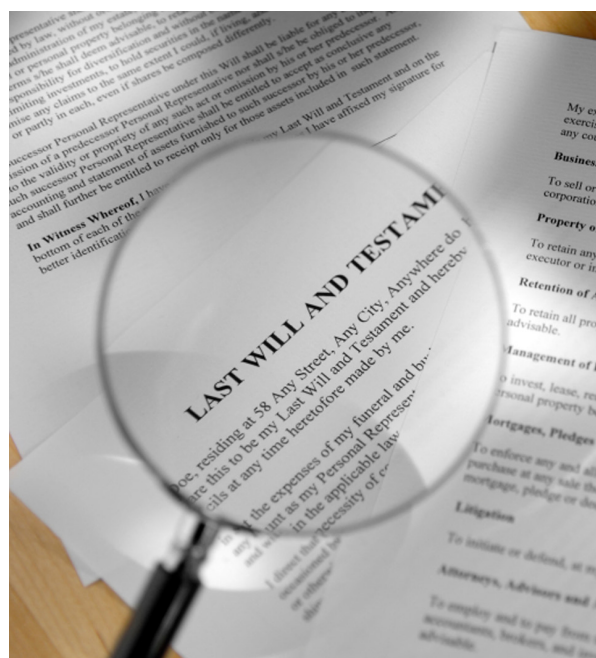
### Deborah Wilkes

Deborah Wilkes is a Legal Assistant and assists Finula and Caroline. She has over 25 years experience and her hourly rate is £170.00 per hour plus VAT. She is supervised by Finula and Caroline.



### Juliette Vienot

Juliette is a Partner and is based at our office at *Burford*. Juliette has more than 30 years post qualification experience and her hourly rate is £265.00 per hour plus VAT.



Our Private Client Team have the experience and skill to guide and support you through the estate administration process and we offer a range of capped price services which vary depending upon the complexity of the matter and the amount of support needed to suit individual circumstances.

The capped fee applies to the service described. We will confirm to you at the beginning of the matter, or as soon as it becomes clear, that any additional work is required outside the terms of the service referred to above. If this is the case, we will let you know as soon as possible and provide you with details of the costs that you will incur which will be based on the hourly rate charged by the member of the team who has conduct of the matter on your behalf.

Further, we offer an initial free 30 minute consultation so that you can meet the member of the team who will be looking after your matter and to discuss which of the services we offer is right for you.

### Bespoke services and hourly rates

Where the nature of the estate administration is not covered by one of our capped price services, we would be pleased to offer you an hourly rate service. We will agree with you the work which we will be undertaking on your behalf, we will provide you with a cost estimate at the outset and update you regularly on your costs so you can stay in control.

Similarly, if you require some assistance in addition to that offered by one of our capped price services, we would be happy to undertake the additional work at an hourly rate and as above, we will provide you with a cost estimate as soon as we become aware the additional work is required.

### Grant of Probate only

**Fee: not exceeding £950 plus VAT at the current rate of 20%**

#### Our Grant only service includes:

- Telephone or personal consultation explaining the process involved.
- Where there is no Will, acting on behalf of surviving spouse/civil partner or adult children to obtain a Grant.
- Where this is valid Will, acting on behalf of the Executors appointed in the Will.
- Completion of the short form Inheritance Tax return form IHT205
- or drafting the Legal Statement via the HMCTS online portal, as appropriate.
- Managing the process with the Court answering any straightforward enquiries.
- Obtaining the Grant of Probate/Letters of Administration and appropriate number of court hologram copies of the Grant.

#### This service does NOT include:

- Where there is no Will, no surviving spouse or surviving adult children.
- Advice relating to the legal validity of the Will or the meaning of the Will.
- Advice related to any further steps required to administer the estate.
- Undertaking searches for a Will.
- Advice relating to the Executors appointment.
- Identifying beneficiaries of the estate.
- Where the deceased was domiciled abroad or there are foreign assets.
- Where the HMRC account, form IHT400, is necessary.
- Transfer of Inheritance Tax nil rate band (form IHT217).
- Registration/notification of death.
- Organising valuations of assets in the estate.
- Dealing with any property related matters e.g. insurance, utilities, Council Tax.
- Advertising of Statutory Notices.
- Any conveyancing which may be required to deal with property in the estate.
- Inheritance Tax, Income Tax or Capital Gains Tax issues.
- Payment of any money gifts in the Will
- Payment of debts and liabilities in the estate.
- Collecting in assets and distributing them to the beneficiaries.
- Preparation of Estate Accounts.
- Any estate expenses such as Probate Court fees (currently £273) and Statutory Notices (approximately £200 plus VAT at the current rate)
- Advice in connection with variation of the estate.
- Conduct of the matter where a dispute between the parties arises.

As a general rule, our Grant only service will take 2 to 3 months to complete (subject to the current timescales as dictated by HM Courts & Tribunal Service) but we will let you know as soon as we become aware that this time estimate will be exceeded and the reasons for it.

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## Net Estate worth less than £325,000

Fee: not exceeding £2,500 plus VAT at the current rate of 20%

### This service is right for you if:

You want us to deal with the whole estate administration.

The net estate is worth less than £325,000.

There are no more than 4 beneficiaries, AND

There are no more than 10 institutions holding estate assets.

### This service includes:

- An estate where there is no Will but there is a surviving spouse and/or adult children.
- Collecting information on the value of the estate.
- Arranging payment of funeral costs.
- Checking and putting in place house insurance if necessary.
- Liaising with all utility companies, Council Tax, TV licence, creditors, store card and club memberships.
- Completion of the short form Inheritance Tax return form IHT205 or drafting the Legal Statement via the HMCTS online portal, as appropriate.
- Obtaining the Grant of Probate or Grant of Letters of Administration as appropriate.
- Collecting in assets, payment of known debts and liabilities.
- Administration advice relating to shareholdings and investment portfolios.
- Advice relating to advertising for unknown creditors.
- Reclaim of Income Tax (only if the deceased was not a self-assessed tax payer).
- Payment of all monetary gifts.
- Preparation of the final Estate Account.
- Distribution of the estate between the beneficiaries and obtaining receipt for payment.

### This service does NOT include:

- Administration of estates where the deceased was domiciled abroad or there are foreign assets.
- Undertaking a search for a Will.
- Identifying beneficiaries of the estate.
- Preparing the documents to claim the transfer of Inheritance Tax nil rate band (form IHT217).
- Where the HMRC account, form IHT400, is necessary
- Conveyancing involved in transfer or sale of property.
- Income Tax returns to the date of death if the deceased was a self-assessed tax payer.
- Dealing with the deceased's business.
- Variations to the estate.
- Any estate expenses such as Probate Court fees (currently £273) and Statutory Notices (approximately £200 plus VAT at the current rate)
- Contested matters, i.e. where there is a dispute between the parties.
- Finalising any estate Income Tax and Capital Gains with HMRC.

Typically the administration of this type of estate will take between 3 to 4 months to complete (subject to the current timescales as dictated by HM Courts & Tribunal Service) but we will let you know as soon as we become aware that this time estimate will be exceeded and the reasons for it.

## Net Estate exceeds £325,000 but does not exceed £650,000

Fee: not exceeding £3,500 plus VAT at the current rate of 20%

### This service is right for you if:

You want us to deal with the whole estate administration.

The net estate is worth more than £325,000 but less than £650,000.

There are no more than 10 beneficiaries, AND

There are no more than 15 institutions who we need to deal with in terms of assets.

### This service includes:

- An estate where there is no Will but there is a surviving spouse and/or adult beneficiaries.
- Collecting in information on the value of the estate.
- Arranging payment of funeral costs.
- Checking and putting in place house insurance if necessary.
- Liaising with all utility companies, Council Tax, TV licence, creditors, store card and club memberships.
- Completion of the short form Inheritance Tax return form IHT205 or drafting the Legal Statement via the HMCTS online portal, as appropriate.
- Completion of the claim for transfer of Inheritance Tax nil rate band (form IHT217) where appropriate.
- Obtaining the Grant of Probate or Grant of Letters of Administration.
- Collecting in assets, payment of known debts and liabilities.
- Administration advice relating to shareholdings and investment portfolios.
- Advice relating to advertising for unknown creditors.
- Reclaim of Income Tax (only if the deceased was not a self-assessed tax payer).
- Payment of all monetary gifts.
- Preparation of the final Estate Account.
- Distribution of the estate between the beneficiaries and obtaining receipt for payment.

### This service does NOT include:

- Administration of estates where the deceased was domiciled abroad or there are foreign assets.
- Undertaking a search for a Will.
- Identifying beneficiaries of the estate.
- Where the HMRC account, form IHT400, is necessary.
- Conveyancing involved in transfer or sale of property.
- Income Tax returns to the date of death if the deceased was a self-assessed tax payer.
- Dealing with the deceased's business.
- Variations to the estate.
- Any estate expenses such as Probate Court fees (currently £273) and Statutory Notices (approximately £200 plus VAT at the current rate).
- Contested matters, i.e. where there is a dispute between the parties.
- Finalising any estate Income Tax and Capital Gains with HMRC.

Typically the administration of this type of estate will take between 6 to 8 months to complete (subject to the current timescales as dictated by HM Courts & Tribunal Service) but we will let you know as soon as we become aware that this time estimate will be exceeded and the reasons for it.

## Net Estate exceeds £650,000 but does not exceed £2,000,000

Fee: £5,000 to £8,000 plus VAT at the current rate of 20%

### This service is right for you if:

You want us to deal with the whole estate administration.

The net estate is worth more than £650,000 but does not exceed £2,000,000.

There are no more than 15 beneficiaries, AND

There are no more than 20 institutions who we need to deal with in terms of assets.

### This service includes:

- An estate where there is no Will but there is a surviving spouse and/or adult beneficiaries.
- An estate where there is a Will with duly appointed Executors who are willing to act.
- Collecting in information on the value of the estate.
- Arranging payment of funeral costs.
- Checking and putting in place house insurance if necessary.
- Liaising with all utility companies, Council Tax, TV licence, creditors, store card and club memberships.
- Completion of the IHT400 Inheritance Tax account.
- Completion of the claim for transferrable nil rate band (form IHT402), where appropriate.
- Completion of the claim for the residence nil rate band (form IHT435), where appropriate.
- Completion of the claim for transferrable unused residence nil rate band (form IHT436), where appropriate.
- Arranging for payment of Inheritance Tax due on delivery of the account from estate assets only.
- Submission of the IHT400 account to HMRC.
- Obtaining the Grant of Probate or Grant of Letters of Administration.
- To responding to straightforward enquiries from HMRC.
- Collecting in assets, payment of known debts and liabilities.
- Administration advice relating to shareholdings and investment portfolios.
- Advice relating to advertising for unknown creditors.
- Reclaim of Income Tax (only if the deceased was not a self-assessed tax payer).
- Payment of all monetary gifts.
- Transfer of assets, including estate property to the beneficiaries.
- Preparation of the final Estate Account.
- Distribution of the estate between the beneficiaries and obtaining receipt for payment.

### This service does NOT include:

- Administration of estates where the deceased was domiciled abroad or there are foreign assets.
- Undertaking a search for a Will.
- Identifying beneficiaries of the estate.
- Dealing with the sale of estate property.
- Income Tax returns to the date of death if the deceased was a self-assessed tax payer.
- Dealing with the deceased's business.
- Variations to the estate.
- Contested matters, i.e. where there is a dispute between the parties.
- Any estate expenses such as Probate Court fees (currently £273) and Statutory Notices (approximately £200 plus VAT at the current rate).
- Finalising any estate Income Tax and Capital Gains with HMRC.
- Dealing with an Inheritance Tax Compliance Check by HMRC.

Typically, the administration of this type of estate will take between 7 to 12 months to complete (subject to the current timescales as dictated by HM Courts & Tribunal Service) but we will let you know as soon as we become aware if this time estimate will be exceeded and the reasons for it.