

Obtaining a Grant of Representation only [non-taxable estates]

We can apply for a Grant of Representation [Grant of Probate or Letters of Administration] on your behalf for a simple estate where:

- There is either a valid will (Grant of Probate or Grant of Letters of Administration with the will) or there is no valid will (Grant of Letters of Administration).
- The estate is below the nil rate band (currently £325,000).
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC.

We will:

- Meet with you to discuss the estate and your instructions
- Where necessary, obtain the relevant information and documentation in relation to all estate assets and liabilities.
- Prepare the relevant papers for submission to the Probate Registry together with any notices that need to be lodged
- Meet with you to arrange the signing and swearing of the relevant papers.
- Lodge the relevant papers at the Probate Registry.

Breakdown of Costs and Disbursements

Our Fees	£650.00 - £950.00
VAT	£130.00 - £190.00

Disbursements

Grant Application (currently Dec 18)	£155.00
Sealed Copies of the Grant	£ .50
Oath Fee	£ 7.00

Timescales

- Obtaining a Grant of Representation usually takes between 4-8 weeks

Obtaining a Grant of Representation and administering a non-taxable estate

We can apply for a Grant of Representation [Grant of Probate or Letters of Administration] on your behalf and then deal with the administration and distribution of the estate so as to handle the full process for you. Our stated fees apply for simple estates where:-

- There is either a valid will (Grant of Probate or Grant of Letters of Administration with the will) or there is no valid will (Grant of Letters of Administration).
- There is no more than **one** property.
- There are no more than **six** bank or building society accounts.
- There are no other intangible assets.
- There are **one to eight** beneficiaries.
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC.

Not including:-

- Foreign assets
- Domicile related issues
- Insolvent estates
- Claims made against the estate — Claims by the Department for Work and Pensions; Inheritance [Provision for Family and Dependants] Act 1975.
- Disputes between beneficiaries and/or legal representatives
- Administration and setting up Trusts
- Disputes concerning the validity of any will
- Disputes concerning the administration and distribution of estates

We will:-

- Provide you with an experienced Solicitor who will meet with you to discuss the estate and your instructions.
- Liaise with the relevant institutions to obtain the required information to be incorporated into the relevant papers to be submitted to the Probate Registry.
- Prepare any relevant notices that need to be lodged.
- Prepare the relevant papers for submission to the Probate Registry including Inland Revenue account with any notices that need to be lodged.
- Meet with you to arrange the signing of the probate papers and arrange for the submission of the papers to the Probate Registry.
- Collect in all assets and deal with the distribution of the estate.
- Prepare estate accounts

Costs and Disbursements

- This will ordinarily take between 10 to 15 hours work. Our hourly rate will be £200.00 + VAT. Our total costs ordinarily range from between £2,000.00 plus VAT and £3,000.00 plus VAT.
- In accordance with Law Society practice advice guidelines, we will make a value charge in addition to the above hourly rate which is based on the size, extent and complexity of the estate and calculated at 1% of the gross value of assets held solely in the name of the deceased [not including any dwelling house] and 0.5% of the value of any dwelling house. VAT is payable in addition. Where the Executor or Executors consist solely of Solicitors in the Firm, the rates applicable are 1.5% of the gross estate [excluding the dwelling house] and 0.75% of the value of the dwelling house.
- Fees may vary depending on the individual circumstances of an estate. We therefore reserve the right to revise our fees where we consider it appropriate to do so and which will be discussed with you.

Disbursements

Grant Application (currently Dec 18)	£155.00
Sealed Copies of the Grant	£ .50
Oath Fee	£ 7.00
Bankruptcy search fees - £2.00 per name	
London Gazette [Section 27 Trustee Act 1925 notice where applicable]	£105.00
Local newspaper advertisement [Section 27 Trustee Act 1925 notice where applicable] up to £300.00 * prices vary per publication	

Exact total costs will depend on the individual circumstances of a matter in respect of which a written quotation will be provided.

Potential additional disbursements:-

- Where the estate includes multiple Share Holdings, Stocks and Bonds, the firm will give consideration to the instruction of a suitable Stock Broker to provide the necessary valuations that will need to be incorporated into any documents which are to be submitted to HMRC and to oversee the transfer or sale of any estate holdings together with the procedural requirements in respect thereof.
- There may be cases where either a Valuer or Chartered Surveyor will need to be instructed to give probate and current valuations in respect of any estate property.
- Engaging third parties such as missing will or beneficiary tracing services.
- Obtaining relevant property and indemnity insurance.

Timescales

On average we aim to administer non-taxable estates between 6-9 months. This can be longer depending on circumstances for example where property has to be sold.

Obtaining a Grant of Representation and administering a taxable estate

We can apply for a Grant of Representation [Grant of Probate or Letters of Administration] on your behalf and then deal with the administration and distribution of the estate so as to handle the full process for you. Our stated fees apply for estates where:-

- There is either a valid will (Grant of Probate or Grant of Letters of Administration with the will) or there is no valid will (Grant of Letters of Administration).
- There is no more than **one** property.
- There are no more than **six** bank or building society accounts.
- There are no other intangible assets.
- There are **one to eight** beneficiaries.
- There is Inheritance Tax payable [and need to submit a full account to HMRC].
- There are no claims made against the estate.

Not including:-

- Foreign assets
- Domicile related issues
- Insolvent estates
- Claims made against the estate — Claims by the Department for Work and Pensions; Inheritance [Provision for Family and Dependents] Act 1975.
- Disputes between beneficiaries and/or legal representatives
- Administration and setting up Trusts
- Disputes concerning the validity of any will
- Disputes concerning the administration and distribution of estates

We will:-

- Provide you with an experienced Solicitor who will meet with you to discuss the estate and your instructions.
- Liaise with the relevant institutions to obtain the required information for the probate papers.
- Prepare the probate papers including the oath, Inland Revenue forms, and any necessary notices or affidavits.
- Arrange to pay any Inheritance Tax.
- Meet with you to arrange the signing of the probate papers and arrange for the submission of the papers to the probate registry.
- Collect in all assets and deal with the distribution of the estate.
- Settle all estate liabilities from estate monies.
- Prepare estate accounts.

Costs and disbursements

- This will ordinarily take between 12 to 25 hours work. Our hourly rate will be £200.00 + VAT. Our total costs ordinarily range from between £2,400.00 plus VAT and £5,000.00 plus VAT.
- In accordance with Law Society practice advice guidelines, we will make a value charge in addition **to** the above hourly rate which is based on the size, extent and complexity of the estate and calculated at 1% of the gross value of assets held solely in the name of the deceased [not including any dwelling house] and 0.5% of the value of any dwelling house. VAT is payable in addition. Where the Executor or Executors consist solely of Solicitors in the Firm, the rates applicable are 1.5% of the gross estate [excluding the dwelling house] and 0.75% of the value of the dwelling house.
- Fees may vary depending on the individual circumstances of an estate. We therefore reserve the right to revise our fees where we consider it appropriate to do so and which will be discussed with you.

Disbursements

Grant Application (currently Dec 18)	£155.00
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Oath Fee	£ 7.00

London Gazette [Section 27 Trustee Act 1925 notice where applicable] £105.00
Local newspaper advertisement [Section 27 Trustee Act 1925 notice where applicable] up to £300.00 * prices vary per publication

Exact total costs will depend on the individual circumstances of a matter in respect of which a written quotation will be provided.

Potential additional disbursements:-

- There may be cases where advice may be required from a Chartered Accountant in respect of any Inheritance Tax, Capital Gains Tax and Income Tax liability which an estate may incur and which may involve the preparation and submission of a relevant return to HMRC.
- Where the estate includes multiple Share Holdings, Stocks and Bonds, the firm will give consideration to the instruction of a suitable Stock Broker to provide the necessary valuations that will need to be incorporated into any documents which are to be submitted to HMRC and to oversee the transfer or sale of any estate holdings together with the procedural requirements in respect thereof.

- There may be cases where either a Valuer or Chartered Surveyor will need to be instructed to give probate and current valuations in respect of any estate property.
- Engaging third parties such as missing will or beneficiary tracing services.
- Obtaining relevant property and indemnity insurance.

Timescales

On average we aim to administer taxable estates between 6-12 months. This can be longer depending on circumstances for example where property has to be sold.