



The Probate and Estate Administration Process and Our Charges

Applying for the grant, collecting and distributing the assets

During the course of an administration, we would:

- Meet with the Personal Representatives (1 - 2 hours)
- Advise on the procedure involved in the administration
- Contact those with financial relationships with the estate, establish the nature and extent of the assets in the estate (anything between 0.5 - 10 hours depending on the nature and extent of the assets involved).
- Prepare a schedule of assets and liabilities (0.5 – 1.5 hours)
- Prepare the appropriate Inheritance Tax Return (anything between 1 – 8 hours depending on the nature and extent of the estate and the personal financial circumstances of the deceased).
- Arrange for payment of Inheritance Tax where possible (0.5 – 1 hour),
- Prepare the appropriate statement of truth for the Personal Representatives (0.5 – 1 hour, although possibly more if there is no Will and the family structure is unclear).
- Deal with any Probate Registry enquiries (1 - 2 hours), obtain the grant, take instructions on the liquidation or transfer of assets in the estate.
- Advise on Estate Planning and Tax mitigation opportunities for beneficiaries during the course of the administration (1 - 4 hours).
- Correspond with HMRC over Inheritance Tax and Tax in Administration issues (2 - 10 hours depending on the nature and extent of the estate and the nature of HMRC's enquiries).
- Prepare estate accounts (1 - 5 hours depending on the nature and complexity of the estate),
- Settle tax arising during the administration period (1 - 2 hours).
- Run bankruptcy searches on beneficiaries (0.5 hours depending on the number of beneficiaries).
- Place statutory adverts for creditors and arrange for distribution of the estate (1 - 2 hours).

In most cases our charges are based on an hourly rate plus VAT. We do not charge an hourly rate for all cases; our rates consider the complexity of every case and the experience of the conducting solicitor.

Our Fixed Fee Services

We offer a fixed fee, detailed below, to obtain a Grant of Representation where details of the assets and liabilities of the estate are provided to us and no full Inheritance Tax Return is required.

Description of Work	Fee Charged	Plus VAT at 20%	Total Fees
Obtaining Grant of Representation	£750	£210	£960

Our Hourly-Rate Services

Our fees for our probate and estate administration services vary depending on the level and experience of the individual lawyer. Our hourly rates are subject to VAT which is detailed in the table below. Your legal representative's hourly rate will be confirmed in our initial client care letter once you instruct us.

The total fee will depend on the nature and extent of the assets in the estate and whether or not any disputes arise during the course of the administration.

By way of illustration, an estate comprising a house worth £170,000, two or three bank accounts, stocks and shares ISA with a total value of £80,000 where the estate passes by Will and the executors appointed by the Will are acting would typically cost around £3,120 - £4,536 to you (comprised of legal fees of between £2,600 - £3,780 + VAT of 20% at £520 - £756), depending upon the experience of the lawyer assigned to the case. *This illustration assumes we have not been involved with attending the property to clear it or to allow access to estate agents and viewers, it also assumes there are only a couple of beneficiaries named in the Will.*

We always provide a fee estimate at the beginning of the matter, based on our assessment of the complexity of the estate.

Name of Lawyer	Hourly Rate	Plus VAT at 20%	Total Hourly Rate
Nina Huitson	£315	£63	£378
Frauke Collins	£285	£57	£342
Gemma Bowman	£260	£52	£312

Exclusions

- The cost of dealing with detailed enquiries from the Recovery from Estates Team of the Department of Work and Pensions is not included in an original estimate as it is usually not foreseen at the outset of the matter.
- Transfers of Estate Land and Buildings to third parties (i.e. non-beneficiaries) are quoted separately.

Expenses

The following disbursements (expenses) are charged by third parties and may be incurred in probate/estate administration:

Disbursement	Fee Charged
Probate Registry Fee	£300 (+ £16 per sealed office copy)
Bankruptcy Search Fee	£2 per beneficiary
Statutory Adverts for Creditors	£230 to £350 approximately

Our Team

Our probate team includes:

Name	Position	Experience
Nina Huitson	Solicitor, Director	Qualified 2016
Frauke Collins	Solicitor	Qualified 2021
Gemma Bowman	Legal Clerk	Over 5 years
Leah Jepson	Paralegal	Over 4 years
Victoria Hope	Trainee Solicitor	Over 6 months
Joanne Richardson	Secretary/Assistant Life Team	Over 40 years
James Duggan	Secretary/Assistant Life Team	Over 18 months

Regardless of who works on your matter, they will be supervised by **Nina Huitson, Department Manager and Director.**

If you find yourself with responsibility for arrangements following the death of a friend or loved one, we are always happy to talk through with you how we might be able to help.