

Private Client – Probate Work

Our Estimated fees are subject to VAT at 20% and are not inclusive of disbursements. Charges are calculated at a fixed fee and will be subject to the complexity of the matter. An estimate will be provided in our letter of engagement once we have confirmation as to the size of the estate.

We are usually able to identify any potential problems that may arise at the outset of the instruction once we have been supplied with full details of the estate, however there may be instances where unforeseen complications mean that more extensive work will be involved than first anticipated.

In any event, the sum charged will be fixed and agreed with you in advance.

It should be noted that dealing with the sale or transfer of any property in the estate is not included in our estimate and will be quoted separately by our Conveyancing Department.

Lawyer dealing with your matter	Hourly Rate (Plus VAT)
Oliver James Saxon	£250.00

Estate Administration costs (estimated)	Amount (Plus VAT)
1 Hour initial consultation	£150.00
Legal fees for administration of a straightforward estate	1.5% of the gross estate plus disbursements
Legal fees for administration of a complex estate	2% of the gross estate plus disbursements
Legal fees for a 'Grant only' service (We would only prepare the papers to obtain the Grant of Representation)	£800-£1500 plus disbursements

Disbursements	Cost
Will register search	£200.00 (approx.)
Land Registry official copy of Title	£3.00
Fee to be paid to HMCTS (Her Majesty's Court and Tribunal Service)	£273.00 + £1.50 per copy document
Trustee Act (section 27) Notice fee	£200.00 (approx.)
Land Registry bankruptcy search	£2.00
Valuation and property sales fees	Provided by third party upon enquiry

Probate work – What we do

This is a list of the work we would generally carry out on behalf of the Personal Representatives and the Estate:

- a. Take initial instructions and identify the legally appointed executors, administrators and beneficiaries
- b. Confirm the type of grant application required
- c. Open a new file and send out our initial client care pack
- d. Obtain all documentation required to make the relevant application
- e. Complete the required HMCTS and HMRC application forms and submit them
- f. Arrange for inheritance tax to be paid if applicable
- g. Receive the Grant when it is granted
- h. Collect all assets of the estate and settle any liabilities
- i. Obtain clearance from HMRC if required
- j. Prepare estate accounts for your approval
- k. Distribute the estate to the beneficiaries

An average Probate matter takes around 8-16 months where the estate is straightforward. The first 2-4 months are spent obtaining details of assets and liabilities as at the date of death. Obtaining the Grant usually takes 4-8 months and the collection of assets then follows, taking 2-4 months.

We are able to prepare estate accounts once all assets and liabilities have been dealt with and once we have obtained clearance from HMRC (if required) in relation to any tax (Income, Inheritance, Capital Gains).

Upon approval of the estate accounts by all parties, we can then look to distribute the estate and finalise the matter.