

## WILLS, PROBATE AND LASTING POWER OF ATTORNEY COSTS

(Fees are applicable as of 1st May 2023 but may be subject to change)

WILLS	FIXED FEE	TOTAL COST
Single Will	£350+VAT	£390
Mirror Wills (for example, Husband & Wife)	£475+VAT	£540
<b>Wills including Trusts or large number of beneficiaries:</b>		
Single	£500+VAT	£510
Mirror	£650+VAT	£780
<b>Codicils (for minor changes only):</b>		
Single	£200+VAT	£210
Mirror	£300+VAT	£360
Notice of Severance	£200+VAT	£240
1975 Act Statement	£200+VAT	£240

The above prices are for indicative purposes. There may be additional factors that increase the basic costs.

HOME OR HOSPITAL VISITS up to 10 mile radius	FIXED FEE	TOTAL COST
Home or hospital visits are charged at	£75+VAT	£90

GRANT OF PROBATE ONLY (NO IHT PAYABLE):	FIXED FEE	TOTAL COST
Fixed fee (including IHT205 calculations)	£995+VAT	£1140
<b>Plus, (if required):</b>		
Claim for unused Spouse Nil Rate Band	£150+VAT	£180
Renunciation	£250+VAT	£180
Notice of Power Reserved	£150+VAT	£180
Statement of Truth (due execution/plight and condition, etc)	£250+VAT	£300

### ADMINISTRATION OF ESTATE OR APPLICATION FOR PROBATE WITH FULL IHT ACCOUNTS

\*Chargeable on a time spent basis: Plus Value Element (as per Law Society guidelines) + VAT

FEE EARNER	HOURLY RATE
Philip Conway	£275 per hour +VAT
Kym Clarke	£300 per hour +VAT
Mehnaz Siddiqui	£280 per hour +VAT
Hayley McLoughlin	£250 per hour +VAT
Charlotte Tunstall-Prince	£200 per hour +VAT

PROBATE REGISTRY FEES	FIXED FEE	TOTAL COST
Basic standard fee	£300	£300
Each sealed copy	£1.50	£1.50

LASTING POWER OF ATTORNEY	FIXED FEE	TOTAL COST
Single LPA	£400+VAT	£480
Both LPAs for one Donor (Property & Financial Affairs and Health & Welfare)	£700+VAT	£840
Spouses making one LPA each in similar terms at the same time	£700+VAT	£840
Spouses making both LPAs (Property & Financial Affairs and Health & Welfare)	£950+VAT	£1140

### SOUTHEND-ON-SEA OFFICE

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## FIXED FEE GRANT ONLY

We can help you through this difficult legal process by applying for the Grant on your behalf, leaving you to collect the assets and distribute the estate personally. This fixed fee service is suitable for estates where there is no inheritance tax liability and all information regarding the assets and value of the estate is provided by you.

## HOW MUCH WILL IT COST?

The cost is £950 + VAT which covers the work up to and including issue of the Grant of Probate or Letters of Administration. There may be other additional costs, for example if an executor wishes to renounce probate (£250 + VAT) or if a Statement of Truth is required concerning the circumstances surrounding the condition or execution of the will (£250 + VAT).

Disbursements are costs relating to the matter that are payable to third parties such as the court application fee (currently £300 + £1.50 for each sealed copy)

As part of our fixed fee we will:-

- Provide you with a dedicated and experienced probate lawyer to work on your matter
- Identify the legally appointed executors or administrators
- Accurately identify the type of application you will require
- Obtain from you the relevant information required to make the application
- Calculate the gross and net estate figures
- Complete the application and the relevant HMRC forms (if applicable)
- Make the application to the Probate Court on your behalf
- Obtain the Grant and send the original and sealed copies to you

## HOW LONG WILL IT TAKE?

We are usually able to prepare the HMRC account and Grant application within 15 working days of all the information being provided by you. We aim to lodge these documents at the Probate Registry within a further 10 days after the papers are signed by you. The Probate Registry are currently processing the applications in approximately 12-14 weeks. When the Grant is received it will be forwarded to you to personally deal with the administration of the estate.

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## FULL ADMINISTRATION OF ESTATE

We can handle the full administration of the estate on behalf of the Executors or Administrators. As part of this service we will:-

- Provide you with a dedicated and experienced probate lawyer to work on your matter
- Identify the legally appointed executors or administrators
- Accurately identify the type of application you will require
- Ascertain the value and nature of the assets
- Obtain the relevant information required to make the application
- Complete the application and the relevant HMRC forms
- Arrange to make a payment on account of Inheritance Tax, if required
- Make the application to the Probate Court on your behalf
- Obtain the Grant and lodge with the asset holders
- Collect the assets and pay any remaining tax and liabilities
- Prepare Estate Accounts and distribute to beneficiaries

## HOW MUCH WILL IT COST?

The current hourly rate for Philip Conway is £275+VAT. The hourly rate for Kym Clarke is £250+VAT. The hourly rate for Hayley McLoughlin is £200+VAT and the hourly rate for Charlotte Tunstall-Prince is £180+VAT. It is difficult to estimate how many hours of work will be necessary to complete the administration of an estate and the exact cost will depend upon the individual circumstances of the matter and whether any problems arise; for example, regarding the interpretation of the Will, if a dispute arises between beneficiaries or if a claim is made against the estate by a relative or some other person.

As a general guide the total time spent on administering an average estate by our more experienced lawyers is usually between 10 hours (£2,500) and 20 hours (£5,000) + VAT. An average estate is where:-

- There is a valid will
- There is no more than one property
- There are no more than 4 bank or building society accounts
- There are no other intangible assets
- There are no more than 4 beneficiaries
- There are no disputes between beneficiaries on division of assets.
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC

On estates which are more complex, i.e. where there is no will, multiple properties and assets and a large number of beneficiaries, or where full HMRC accounts are required and inheritance tax payable, the anticipated time is likely to be between 15 hours (£3,750) and 35 hours (£8,750) + VAT

We will be able to provide you with a more accurate estimate after we have more information about the estate.

Disbursements are costs related to your matter that are payable to third parties and may include:-

- The Grant application fee £300
- Copies of the Grant £1.50 each

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- Trustee Act Notices in the London Gazette and local newspapers (varies but usually in the region of £250-£450)
- Land Registry searches £3 + VAT per property

Potential additional costs:-

- The sale or transfer costs of any property in the estate will be dealt with by our conveyancing team and quoted separately.
- In accordance with Law Society suggested guidelines an additional percentage charge may be applied to our final bill, based on the gross value of the assets collected or transferred. The percentages are 0.5% on the residence and 1% on the remaining assets rising to 0.75% and 1.5% respectively if Jefferies are appointed as executors although we often reduce the value charges, depending on the circumstances and the complexity of the estate.

## HOW LONG WILL IT TAKE?

The time from the date of instruction to completion of the administration will vary widely from case to case. On average, a simple estate with no property to sell may be finalised within 4-6 months. Some complex estates can take 12-24 months to bring to a conclusion.

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