

PROBATE & ESTATE ADMINISTRATION

DESCRIPTION OF SERVICES

Please take time to read the following description of our PRIVATE CLIENT – ESTATE ADMINISTRATION SERVICES to ensure we provide a quote for the correct service(s) you require.

GRANT ONLY SERVICE

What does this service include?

We will obtain the Grant of Representation in the estate on behalf of the personal representative(s). To do this, we will:

- send a detailed fact find to the personal representative(s) to enable the relevant information to be collated;
- prepare the necessary paperwork to obtain the Grant based on the information provided to us by the personal representative(s);
- meet with the personal representative(s) at our office (if required) to have the necessary paperwork signed as appropriate;
- calculate the inheritance tax liability (if any) and, if inheritance tax is payable, advise the personal representative(s) on practically how this can be paid and assist them with arranging for sufficient inheritance tax to be paid to enable the Grant to be issued;
- submit the necessary paperwork to HMRC Inheritance Tax Office and/or the Probate Registry as appropriate in the circumstances; and
- liaise with HMRC Inheritance Tax Office and the Probate Registry as required to enable the Grant to be issued.

Our role in the estate will not include liaising with any third party institutions and/or beneficiaries to obtain details about the estate, nor will it include any general estate administration. Once the Grant is issued by the Probate Registry it will be provided to the personal representative(s) for their use in the estate administration and our involvement in the estate will be concluded. If you decide to use the grant only service, the fee estimate provided does not include liaising with any third party other than HMRC Inheritance Office and the Probate Registry. Nevertheless, we can still assist you with ancillary matters that arise during the grant only service.

If there are any such matters you need assistance with we will discuss them with you and agree fees separately.

GRANT AND ADMINISTRATION SERVICE

What does this service include?

Firstly, this includes the matters listed in the bullet points under the Grant Only Service. In addition, we will undertake the general estate administration on behalf of the personal representative(s) of the estate. This will include:

- liaising with relevant third party financial institutions to ascertain the assets and liabilities of the estate;
- collecting in the estate assets;
- settling the estate liabilities (using the estate assets only);
- liaising with any beneficiaries of the estate;
- preparing estate accounts for approval by the personal representative(s); and
- distributing the estate in accordance with the Will or the intestacy rules as appropriate.

Our role in the estate would not include any of the following matters unless specifically agreed by us with the personal representative(s). We can provide isolated quotes for any of these matters once specific further information about the estate has been provided.

- dealing with the deceased's income tax and capital gains tax reporting in respect of their outstanding lifetime affairs.
- dealing with the personal representative(s) income tax and capital gains tax reporting for the estate administration period.
- dealing with any claims made by third parties against the estate.
- dealing with the sale or transfer of real property
- dealing with the registration with HMRC of any trust created as a result of the death.

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- administering any trust created as a result of the death.
- varying the Will of the deceased or the position left on intestacy.
- obtaining a Grant (or equivalent) in any jurisdiction other than England and Wales to enable foreign assets to be administered.

DATA PROTECTION

Gordons LLP are committed to protecting and respecting your privacy. For the purposes of data protection legislation, we are the data controller and will process any personal data provided in accordance with the General Data Protection Regulation (EU) 2016/679 and national laws which relate to the processing of personal data.

We will use the information you have provided in order to contact you about the services you have enquired about. Please see our privacy policy available on our website: [Privacy Policy](#).

From time to time we would like to contact you with details of similar services we provide which may be of interest. If you consent to us using your details for this purpose, please complete our Marketing subscription form by following the link: [Marketing Preferences](#)

ESTIMATED COSTS

Grant Only Service – If an inheritance tax return is not required, in most cases we will charge a fixed fee of £750 + VAT.

Grant Only Service – If an inheritance tax return is required, in most cases we will charge a fixed fee between £1,500 + VAT and £2,000 + VAT subject to the circumstances of the estate.

Grant and Administration Service – In addition to the relevant fees set out for the Grant Only Service, our fees will be determined by the amount of anticipated time and work required in the circumstances of each individual estate.

We would estimate that such additional fees for this service would generally be in the region of £3,000 – £10,000 + VAT. Fees may be more or less than this.

For example, if there is one beneficiary of the estate and the estate assets comprise of cash in a small number of accounts then we would expect the costs to be at the lower end of this range. If on the other hand, there were numerous beneficiaries and the estate assets comprise a wide range of assets such as cash, property, shares and policies then we would expect the costs to be at the higher end of this range. To be clear, the cost is not calculated as a percentage of the value of the estate and the actual costs will depend on the individual circumstances of the matter.

We will wherever possible provide a more accurate estimate of our costs at the outset of the matter once more details are known. If that estimate falls outside of either end of the range mentioned above, we will be able to explain why.

Disbursements – In all cases, there will be an additional disbursement in respect of the **Probate Registry's fee which is a minimum of £300 + VAT**. There may be additional third party provider disbursements if for example you wish to (a) place a formal notice in a local newspaper and/or the London Gazette to advertise for unknown creditors of the estate (b) carry out a search of a wills register or (c) carry out an estate asset search. We can help facilitate these for you if required.

PROBATE & ESTATE ADMINISTRATION

MEET THE TEAM:

GREG DIXON

PARTNER

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Greg's focus is on individuals and families, advising on the best options available to pass on family wealth and business interests in lifetime and on death, including inheritance tax planning and offering practical advice, tailored to the objectives of the client. He looks after all aspects of private client work, including drafting Wills, Powers of Attorney, Trusts and dealing with the administration of both taxable and non-taxable estates. Greg is also qualified as a TEP (a full member of the Society for Trust and Estate Practitioners).

DIANA SMART

CONSULTANT

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Diana is a solicitor and chartered tax advisor. A member of the Society of Trust and Estate Practitioners for more than 20 years, Diana deals with a wide range of personal legal services including Wills and Probate, Powers of Attorney and Court of Protection, tax and estate planning, and has gained a reputation for giving straightforward practical advice in complex situations.

ALICE LESLIE

SOLICITOR

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Alice looks after all aspect of private client work, including drafting Wills, Powers of Attorney, Trusts and dealing with the administration of both taxable and non-taxable estates. Alice also advises clients on succession and inheritance tax planning, and is able to offer practical advice, tailoring this to the objectives of the client. Alice is also qualified as a TEP (a full member of the Society for Trust and Estate Practitioners).

AMBREEN AHMED

SOLICITOR

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Ambreen deals with all aspects of private client work, specialising in completing Lasting Powers of Attorney and applications to the Court of Protection in respect of Deputyships, advising on day to day handling of both property and financial affairs and health related issues. She advises clients in relation to inheritance tax and succession planning through wills and trusts. She also acts for executors in advising and completing probate applications and in the administration of estates.

MEGAN STOCKS

CHARTERED LEGAL EXECUTIVE

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Megan joined the private client having completed Gordons' legal apprenticeship and advises on all aspects of private client work including Will writing, registering and administering Lasting Powers of Attorney and Court of Protection orders and handling the administration of both taxable and non-taxable estates from start to finish. Megan is also qualified as a TEP (full member of the Society for Trust and Estate Practitioners).

ISCA WATSON

CHARTERED TAX ADVISOR

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Isca is an associated member of the Chartered Institute of Taxation advising on trust and estate compliance, income tax for individuals, capital gains tax and inheritance tax, helping clients optimise their tax positions and comply with regulations, also managing complex trust and estate compliance cases, ensuring that all legal and tax obligations are met accurately and efficiently.