



Fee Schedule

Probate

We have two methods for charging on probate files:

- Fixed-fee quotation; or
- Time-recorded basis.

If we are charging on a time-recorded basis, we estimate the time we will take to complete the work (and therefore the likely cost) and will inform you if this is likely to be exceeded.

Please be aware that a fixed-fee quotation will not be available if an estate is deemed too complex, or there are too many unknown factors.

Fixed Fee Quotation

For fixed-fee quotations, we calculate how much time we anticipate we will spend on your file. We consider several factors including: whether the estate is taxable, if the deceased made any lifetime gifts, the number of legacies and residuary beneficiaries, the number of investments and whether the deceased owned any property.

The overall size of the estate is considered but is not in itself a major factor.

When we have worked out how much time we are likely to spend, we will add a small contingency to cover unexpected developments, then calculate our costs at the hourly rates of £245 to £355 per hour for solicitors, and between £100 to £245 per hour for Legal Executives and support staff. All fees are subject to VAT (currently charged at 20%).

We aim to save our clients' money by using Paralegals and support staff (who have relevant experience and training) for less technical elements of the work and Solicitors or Legal Executives where their expertise is needed.

Time-recorded

To calculate a time-recorded matter, we use the same process as shown above.

For example, if a probate matter takes 20 hours to complete, at a rate of £245 per hour, the estimation would be £4,900+ VAT (currently charged at 20%).



Services

We can assist with full Estate Administration (the process of obtaining the grant of probate, collecting assets, paying debts/taxes, and distributing inheritance) or obtaining the Grant of Representation only (the legal document that authorises the personal representative(s) to manage a deceased's estate).

Grant of Representation only

If you only require assistance with obtaining a Grant of Representation, the typical charge is £1,500 for a non-taxable estate, or £3,500 for a taxable estate, both subject to VAT which is currently charged at 20%.

We ask you to provide the valuations of assets and then sell the assets once probate is granted and distribute them in accordance with the terms of the Will.

If the estate is taxable, our fees include the completion and submission of an IHT400 form, the primary form used to report a deceased person's estate to HMRC when applying for probate.

Grant of Probate Fees

| Service | Fee |
|--|----------------------|
| Grant only (no IHT400 form) | £1,500 + VAT at 20% |
| Grant only (IHT400 form included, non-taxable) | £2,500 + VAT at 20% |
| Grant only (IHT400 form included, taxable) | £3,500 + VAT at 20% |
| Foreign Estates | £3,000 + VAT at 20%* |

*Please note: Foreign estates will not be subject to VAT if you are not domiciled in the UK.

Estate Administration

If you would like us to assist with full Estate Administration, the services that are included are shown below, with likely timescales for key stages:

- Identifying and valuing the assets of the estate;
- Identifying and valuing the liabilities of the estate and settling these once funds are available;
- Preparing the paperwork required for the Grant application, including preparing any inheritance tax return and corresponding with HMRC regarding the payment of any tax;
- Realising the assets of the estate or transferring them to the beneficiaries;
- Preparation of full, detailed accounts showing the estate transactions;



- Completing due diligence checks for beneficiaries and liaising with them regarding the estate administration;
- Distributing the estate in accordance with the terms of the Will or Intestacy;
- Advice on how to protect your position as executor, including arranging statutory notices if required.

Timescale:

- We will always do our best to administer an estate as quickly and efficiently as possible. However, please be aware that we are often reliant upon third party responses, which are outside of our control.
- In the case of a simple probate where we can ascertain valuations of all assets quickly, we may be able to apply for the Grant within 8-12 weeks of the original instruction.
- The probate registry turnaround times for applications can vary but can take up to 16 weeks.
- Once we have the Grant, it can take at least 6-12 weeks to sell the assets and distribute to beneficiaries – though this can be much longer if, for example, a property takes a long time to sell.
- Please be assured that if a matter is urgent (e.g. because of a property sale), we will take whatever steps we can to speed up the process.

Estate Administration – Fees

| Service | Estimated Hours | Fees |
|---|-----------------|--|
| Simple estate (1 property & 5-6 accounts/assets) | 20-30 | Between £4,000-£9,000, based on merged hourly rates (time recorded) + VAT at 20% |
| Complex estate (multiple properties, share portfolios, land, frequent visits) | 70+ | Fees confirmed once details are known + VAT at 20% |

Important: All fees are subject to VAT (at 20%) and disbursements. If a matter is more complex, additional time-based charges may apply. We will always discuss this with you before any further costs are incurred.



Disbursements

Some of the typical disbursements are shown below (excluding VAT where applicable):

- Probate fee: £300 plus £16 for each extra copy of the Grant required
- Bankruptcy searches: £6 each
- ID checks – see extras below
- Fees for obtaining Office Copy Entries from the Land Registry: £7 each
- Fees for valuation of assets and selling shares: various
- Will search, financial asset search and S27 Trustee Act Notices: various

Extras

- ID searches - we use an independent service which saves our clients having to produce original passports etc. We charge £7.50+VAT per search.
- Foreign currency transfers – we charge £45+VAT for each foreign exchange transaction. The receiving bank may charge their own fees. Clients have the option to use a third-party currency exchange service if desired. However, in these circumstances, we charge £125+VAT to remit funds to the bureau under the client's instruction. We cannot take any responsibility for the bureau's conduct.