

Whiterose Blackmans Solicitors LLP
Information for clients: Wills, Probate and Administration of Estates

Introduction

As part of our professional rules, we aim to ensure that anyone wishing to use our services has the information they need to make an informed choice of legal services provider, including understanding what the costs may be.

At Whiterose Blackmans Solicitors we offer a friendly and efficient service in helping you to plan for the future. Based in Leeds, we are accredited against the Law Society Lexcel standard. Our services include advice about preparing a Will, creating a Lasting Power of Attorney and Court of Protection matters.

WILLS - Why Instruct Whiterose Blackmans Solicitors?

Making a Will does not have to be stressful. Early planning has many advantages and planning your Will gives peace of mind and reassurance that your loved ones will be provided for. You can ensure that your assets pass to your chosen beneficiaries and family members. Our team of professionals at Whiterose Blackmans Solicitors fully appreciates the importance of this and will ably assist you in making a Will and guiding you through this sensitive process with as few complications as possible. A Will can also contain provisions for the ongoing care of minor children, business and even detail your funeral wishes. It will ensure that the people you trust are appointed to fulfil your wishes and manage things when you are no longer able to.

Our Fees-

Standard Will fixed fee service which includes an in-person meeting, telephone or video meeting arranged with a Solicitor-

- Single Will: £200.00 plus VAT of £40.00 = £240.00 (without trust drafting)
- Mirror Will: £600.00 plus VAT of £120.00 = £720.00
(for married couples, co-habiting couples or civil partnerships)

VAT is currently calculated at 20%.

Any reference to VAT in this document means it has been calculated at 20% which is the current VAT rate.

What Is Included?

This fee includes–

- (a) Advice on Existing Will(s)
- (b) Advice on Choice of Executor
- (c) Advice on Distribution of the Estate
- (d) Advice on Inheritance Tax threshold
- (e) Solicitor drafted bespoke Will

The fee may be higher if your estate is especially large, or your instructions are complex. This can be discussed further at your initial consultation. More complex Will drafting or other related documents include:

- Wills requiring Trust Drafting- Price dependent on requirements
- Codicils/Will Amendments- Price dependent upon requirements

What Is Not Included?

Disbursements- These are third party costs relating to your matter which can include but are not limited to the following:

- Interpreter or Translator fees.
Translator fees relate to translate of documents that are not in English. Translator fees are normally charged based on the extent of documents that need translation.

We can also offer advice on secure Will storage.

Probate - Why instruct Whiterose Blackmans Solicitors?

We are also able to assist with estate administration and distribution after a loved one has died. We understand that this is a very difficult time, and our aim is to make the administration of an estate as easy for our clients as possible. We are regularly instructed by executors to administer and distribute estates.

Occasionally clients feel comfortable distributing the estate themselves and seek our assistance in obtaining the Grant of Representation only.

A Grant of Representation is a legal document that gives the person or persons named in it the authority to administer the estate of a deceased person. There are 2 main types of Grants of Representation depending on the circumstances of the deceased person's estate. These 2 types, a Grant of Probate which is issued when the deceased left a valid Will or a Grant of Administration which is issued when the deceased dies intestate (without leaving a valid Will).

The administration of an estate where a person dies intestate is often more complicated, but it is our aim to make this as straightforward for you as possible.

To assist our clients, we have set out below an indication of the likely costs involved in Probate matters along with an indication of the timescales.

About our fees

Obtaining a Grant of Representation and dealing with an administration of an estate can be complicated; it usually takes several months, and complex cases can take over a year to ensure everything is done properly.

Every estate is different, and so it can be very hard to quantify probate costs. The work can vary from very straightforward estates with only one or two small value assets and one beneficiary, to complicated estates where there is inheritance tax to pay, multiple beneficiaries and assets held with numerous organisations as well as property and land to sell or transfer and where there are foreign elements to the estate. However, to assist our clients, we have set out below an indication of the likely costs involved in probate and administration of estate matters along with an indication of the potential timescales.

VAT is currently calculated at 20%.

Any reference to VAT in this document means it has been calculated at 20% which is the current VAT rate.

Estate Administration: Applying for the grant, collecting and distributing the assets.

What the service includes

We will:

- Provide you with a dedicated and experienced probate solicitor to work on your matter.
- Identify the legally appointed executors or administrators and beneficiaries.
- Accurately identify the type of application you will require.
- Obtain the relevant documents required to make the application and liaise with all relevant organisations.
- Complete the Application and the relevant HMRC forms.
- Draft a Statement of Truth for you to sign.
- Make the application to the Probate Registry on your behalf.
- Obtain the Grant of Representation and office copies.
- Deal with closure of accounts, collect in estate funds and pay any liabilities.
- Prepare a final estate account and distribute the estate to the beneficiaries.

Anticipated charges and expenses

As we have stated earlier, it is difficult to be precise about the anticipated costs as the exact cost will depend on the individual circumstances of the matter. Therefore, we have set out below the estimated costs of a typical, straightforward transaction. For this example, we have assumed:

- There is a valid will.
- An estate in which there are no more than three bank accounts.
- No more than one property in the sole name of the deceased.
- No debts.
- No likelihood of the estate being insolvent.
- No significant lifetime gifts.
- No shareholdings.
- No trusts to be established.
- No dispute between the beneficiaries on the division of the assets.
- No Inheritance Tax payable and the Executors do not need to submit a full IHT return to HMRC.
- No requirement to use the transferable nil rate band or residence nil rate band.
- No other intangible assets.
- No claims made against the estate.
- No agricultural or business element to the estate.

- No foreign element to the estate.

Administration of estates work is normally charged on a time spent basis. A typical example is set out below:

Estimated time required	16 hours
Hourly rate	£200.00 per hour (Partner-Solicitor)
Our fees	£3,200.00 plus VAT
VAT at 20%:	£640.00
Total	£3,840.00 + disbursements (see below)

Disbursements are costs related to your matter that are payable to third parties, such as court fees. We handle the payment of the disbursements on your behalf to ensure a smoother process. Disbursements are in addition to the above fees and include:

Description	Typical costs
Grant of Representation application fee (estates valued at £5,000 or more)	£300.00
Office copies of the Grant of Representation	£1.50 per copy
Bankruptcy search fee	£1- £2 per name
Section 27 Trustee Act notice fee (this protects the Trustees against creditors)	£300.00 - £400.00
Property Valuation fee	£300-£500 (estimated)
Asset valuation fee	Cost will depend on asset type
Copy Death Certificate	£12.50 per Certificate

Factors that would increase the costs of your matter.

- Not having all of the paperwork available or having incorrect information that needs investigation and correction.
- Third parties not responding to our communications promptly.
- Dealing with unusual, foreign or complex assets or items.
- Court proceedings/Contentious probate.

Potential additional costs

If there is no will or the estate consists of any share holdings (stocks and bonds) or assets with more than three different organisations, there are likely to be additional costs that could range

significantly depending on the estate and how the assets are to be dealt with. Dealing with the sale or transfer of any property in the estate is not included in the above costs.

We can give you a more accurate quote once we have more information.

How long will this take?

It is difficult to estimate with any precision how long an estate matter will take as it will be influenced by many factors, some of which are outside of our control. However, on average, estates that fall within this range are dealt with within 6-9 months. Typically, obtaining the grant of representation takes 9-12 weeks. Collecting assets then follows, which can take between 4-6 weeks. Once this has been done, we can distribute the assets, which normally takes 5-6 weeks. We will keep you updated on the progress and time scales.

Application for Grant of Representation only

What the service includes

We will:

- Provide you with a dedicated and experienced probate solicitor to work on your matter.
- Identify the legally appointed executors or administrators and beneficiaries.
- Accurately identify the type of application you will require.
- Obtain the relevant documents required to make the application.
- Complete the Application and the relevant HMRC forms.
- Draft a Statement of Truth for you to sign.
- Make the application to the Probate Registry on your behalf.
- Obtain the Grant of Representation and securely send copies to you.

Anticipated charges and expenses

We can help our clients through this difficult process by obtaining the Grant of Representation on their behalf. Our typical costs below assume that we are instructed to seek Grant of Representation only, that no full Inheritance Tax Return requires to be completed and submitted to HMRC, and all financial information is supplied by the Executor.

Fixed fee (from):	£1000.00	plus VAT
VAT at 20%:	£200.00	
Total	£1200.00	+ disbursements (see below)

Our typical costs for an application for a grant of Representation where a full Inheritance Tax Return is required to be submitted to HMRC is as set out below.

Fixed fee (from):	£1200.00 - £1,500.00	Plus VAT
VAT at 20%:	£240.00 - £300.00	

Total **£1,440.00 - £1,800.00** + disbursements

Disbursements are costs related to your matter that are payable to third parties, such as court fees. We handle the payment of the disbursements on your behalf to ensure a smoother process. Disbursements are in addition to the above fees and include:

Description	Typical costs
Probate application fee	£300.00
Office copies of the Grant of Representation	£1.50 per copy

Please note the above indicative figures are for obtaining a Grant of Representation only and do not include the administration and distribution of the estate.

How long will this take?

It is difficult to estimate with any precision how long such a matter will take but, on average, such applications are dealt with and finalised within 6-8 weeks. Typically, obtaining the grant of representation takes 9-12 weeks once the application has been sent to HM Probate Registry.

Our Wills and Probate Team

Kareemah Al'Hassan

Kareemah is a Solicitor with over 20 years of experience, having previously qualified as a Barrister in 1993. Kareemah specialises in Probate matters.

Last update: September 2024