

Probate Services 2021/2022

Comprehensive Service	The best option for personal representatives who want comprehensive support including acting as an Executor to the Estate. This package gives you direct access to a Director.
Peace of Mind Service	This includes gathering all of the Probate valuations and making the application for the Grant of Probate
Essential	This includes making the application for the Grant of Probate from valuations and information provided by you.

	Comprehensive Service	Peace of Mind Service	Essential
Initial meeting to discuss Grant of Probate application process and likely timings dependent on size and complexity of the Estate	✓	✓	✓
Review spouse transferrable nil rate band or transferable residential nil rate band	✓	✓	✓
Identify any available reliefs claim and calculate the Inheritance Tax liability	✓	✓	✓
Prepare the Grant of Probate application and submit to the Probate Registry	✓	✓	✓
Prepare the Inheritance Tax forms and submit to HMRC	✓	✓	✓
Obtain all necessary valuations for Probate purposes	✓	✓	X
Collate list of assets and liabilities	✓	✓	X
Review lifetime gifts and calculate available nil rate band	✓	✓	X
Place statutory notices in local newspaper	✓	✓	X
Review Will to ascertain entitlement of Beneficiaries	✓	X	X
Collect in the assets and pay any debts to the Estate	✓	X	X
Pay any legacies to the named Beneficiaries	✓	X	X
Finalise the Estate Income Tax and Capital Gains Tax position	✓	X	X
Distribute the residuary Estate	✓	X	X
Prepare Estate Accounts for the period of administration	✓	X	X

***Our 100% Service Guarantee** – Because we're committed to delivering a high standard of client care we guarantee our services to you 100%. In fact, if you're ever unhappy with anything we do for you, we're perfectly happy for you to pay whatever you want – even if that's nothing! We won't be offended because, ultimately, we'd rather you only pay us if you've valued what we've done.