



Cost Information for Private Client work



Kate Kendall is our expert in Wills, Lasting Powers of Attorney, Probate, Estate Administration and Court of Protection work. Kate has over 25 years experience in legal practice and over 15 years experience in this area of law and has helped thousands of families and individuals.

Kate qualified as a Chartered Legal Executive in 1997 after studying at Salford University. She has worked at a number of firms in Burnley before moving to our firm in May 2018. Kate completes regular professional development courses in her specialised legal field.

Kate strives to provide caring, professional and efficient advice and help to all her clients.

Overall supervision of Kate's work rests with the Directors James Young and Donnamarie Sturrock.

In this section of our website you will find information about our likely charges for this area of work.

Please note however that we do offer preferential rates for returning clients and via employee benefit schemes and we also have regular promotional offers so please contact us for details and so that we can give you a bespoke quote for your matter.

Wills

Our standard fees for straightforward Wills are:-
Single Will - £150 plus VAT
Pair of similar Wills - £225 plus VAT

If your Will is more complex, for example if you wish to include a trust, the cost will be more.

The likely cost for Wills including trusts will be as follows and the cost will depend upon the type of trust required:-
Single Trust Will - £275 to £375 plus VAT
Pair of Similar Trust Wills - £400 to £550 plus VAT

Our standard Will preparation service includes:-

- seeing you at our office and taking your instructions;
- drafting the Will and sending you a draft for approval;
- preparing the engrossed Will and supervising execution of the Will at our office;
- storing your Will securely.

The following matters will not generally be included:-

- providing inheritance tax planning advice;
- advising on potential challenges to the Will or claims against your estate;
- obtaining medical confirmation of your mental capacity to make a Will;
- advising you about property or assets held outside England and Wales;
- seeing you outside the office.

These additional services can be provided for an extra cost. We expect the timescale for preparation of your Will to be in the region of two to four weeks.

Lasting Powers of Attorney

The cost for Lasting Powers of Attorney will depend on a number of variable factors such as whether you wish us to simply prepare the Lasting Powers of Attorney or whether you also wish us to register the Lasting Powers of Attorney with the Office of the Public Guardian. It will also depend whether you require one type of Lasting Power of Attorney (eg property and financial affairs) or whether you require both types of Lasting Power of Attorney (ie property and financial affairs and health and welfare).

The likely cost will be as follows:-

For preparation and registration of a Lasting Power of Attorney for property and finances only - £350 plus VAT. (plus disbursements – see below)

For preparation and registration of a Lasting Power of Attorney for property and finances and health and welfare - £600 plus VAT. (plus disbursements – see below)

Our standard Lasting Power of Attorney service includes:-

- seeing you at our office and taking your instructions;
- drafting the Lasting Power of Attorney;
- supervising execution of the Lasting Power of Attorney at our office;
- preparing the certificate of capacity in straightforward cases or advising if a medical certificate of capacity is required;
- sending the Lasting Power of Attorney to your attorneys for signature;
- preparing and submitting an application to register the Lasting Power of Attorney with the Office of the Public Guardian;
- storing your Lasting Power of Attorney securely;
- providing one certified copy of your Lasting Power of Attorney.

The following matters will not generally be included:

- obtaining medical confirmation of your mental capacity to make the Lasting Power of Attorney;
- seeing you outside our office.
- These additional services can be provided for an extra cost. Disbursements

In addition to our fees the Office of the Public Guardian will charge a registration fee of £82 for each Lasting Power of Attorney. If your income is less than £12,000 per annum or if you are in receipt of certain means tested benefits then you may be eligible for a reduction/exemption in the Office of the Public Guardian fees.

We anticipate the timescale for preparing the Lasting Power of Attorney to be two to four weeks. The timescale for registration of the Lasting Power of Attorney will depend how quickly your attorneys sign and return the Lasting Power of Attorney and how quickly the Office of the Public Guardian process the matter.

Probate

We can obtain a Grant of Probate on your behalf. For simple estates we anticipate this will take approximately three to four hours work at £200 per hour. Our fees are therefore estimated at £600 to £800 per hour plus VAT (plus disbursements - see below).

Our Probate Registry application service includes:-

- seeing you at our office and advising you and taking instructions on the assets and liabilities of the estate;
- preparing the simple inheritance tax return (IHT205);
- preparing the application to the probate registry;
- seeing you at our office to supervise signature of the probate registry application;
- submitting the application to the probate registry;
- sending the Grant of Probate to you.

Complex Estates

In a more complex estate where an inheritance tax return (IHT400) is required we would anticipate that the service described above will take between six to eight hours work at £200 per hour and our fees are therefore estimated at £1,200 to £1,600 plus VAT.

The exact cost will depend on the complexity of the deceased person's financial affairs.

The following matters will not generally be included:

- making Will search enquiries;
- obtaining valuations of the assets and liabilities of the estate;
- advertising for creditors;
- collecting the assets of the estate;
- paying liabilities;
- paying legacies;
- preparing estate accounts;
- distributing the estate;
- setting up any necessary trusts;
- advising on taxes generally;
- completing formal income tax or capital gains tax returns;
- providing investment advice.
- selling the property. If there is a property in the estate our property department will be happy to provide you with a separate estimate of our fees for selling the property.

These additional services can be provided for an extra cost and you should refer to our Estate Administration Service detailed below.

Disbursements

In addition to our fees there will be disbursements. These are costs related to your matter that are payable to third parties, such as court fees. The likely disbursements for probate will be:-

- Probate court fee – currently £155 (the government are set to change this fee in the near future).
- Swearing the Oath – usually £7 or £12.
- Official copies of Probate – 50p per copy.

Timescale

We anticipate the timescale for us to prepare and submit the application will be three to five weeks. The Probate Registry will generally take a similar period of time to process the application.

Estate Administration

Administering the estate of a loved one can be a difficult and time consuming task. We can help you with this. We have detailed below the typical steps that are involved in the administration of an estate. We would be happy to assist you with all or some of the steps. The cost will depend on whether you wish us to deal with all the steps or whether you wish to carry out some of the work yourself. It will also depend on the

complexity of the estate. For example, if there is one beneficiary and no property and one or two bank accounts the cost will be at the lower of the range. If there are multiple beneficiaries, a property and multiple bank accounts and other assets, costs will be at the higher end.

We would be happy to discuss this with you and provide a bespoke quote for your matter.

As a guideline, if we are handling the full process for you we anticipate this will take between 10 to 15 hours work at £200 per hour and our fees are therefore estimated at £2,000 to £3,000 plus VAT (plus disbursements – see below).

This quote is for estates where:

- There is a valid Will.
- There is no more than one property.
- There are no more than six bank or building society accounts.
- There are no more than four other intangible assets.
- There are no more than four beneficiaries.
- There are no disputes between beneficiaries on division of assets. If disputes arise this is likely to lead to an increase in cost.
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC.
- There are no claims made against the estate.

The full estate administration service includes:

- seeing you at our office and advising you and taking instructions on the assets and liabilities of the estate;
- making Will search enquiries;
- obtaining valuations of any house or property and any personal belongings;
- writing to financial institutions to obtain valuations of the assets and liabilities of the estate;
- preparing the inheritance tax return (IHT205);
- preparing the application to the probate registry;
- seeing you at our office to supervise signature of the probate registry application;
- submitting the application to the probate registry for the grant of probate or grant of letters of administration;
- advertising for creditors in the local press and the London Gazette;
- collecting in the assets of the estate;
- paying liabilities;
- paying legacies;
- preparing estate accounts;
- distributing the estate in accordance with the Will;
- setting up any necessary trusts.

The following matters will not generally be included:

- selling the property. If there is a property in the estate our property department will be happy to provide you with a separate estimate of our fees for selling the property;
- advising on taxes generally;

- completing formal income tax or capital gains tax returns;
- providing investment advice.

Disbursements

Disbursements for estate administration are likely to include:-

- Will search fees from £114.00
- Oath fees - £7.00 per executor
- Probate Registry fee currently £155 (the government is set to increase this fee in the near future).
- Fee for additional office copies of the grant of probate 50p each
- Fees for advertising for creditors from £160.00
- Bankruptcy search fees - £2.00 per search

Potential additional costs

If there is no Will or the estate contains shareholdings, stocks and bonds, if there are multiple properties or if the estate has a high value and an inheritance tax return IHT400 is required, there is likely to be additional cost that could range significantly depending on the estate and how it is to be dealt with. We can give you a more accurate quote once we have more information.

Timescale

Unless the estate is complex it will usually be dealt with within six to twelve months. Typically valuing the estate takes six to eight weeks obtaining the Grant of Probate takes three to six weeks. Collecting assets then follows which can take approximately eight to ten weeks. If the estate has a property to sell this can take longer and it is difficult to predict the timescale for sale of a property. Once the property has been sold and all assets collected we can prepare estate accounts and distribute the assets which normally takes four to six weeks.

Court of Protection

We can act on your behalf in connection with applications to the Court of Protection.

There are many different types of application to the Court of Protection and we will be able to give you a bespoke quote for the particular application that you require.

By way of an example, an application to the Court of Protection for you to be appointed as the deputy to manage a person's property and finances is likely to take between six to eight hours at £200 per hour and our fees are therefore estimated at £1,200 to £1,600 plus VAT (plus disbursements – see below).

Disbursements

The following disbursements are likely to be needed:-

- Court fee - £385
- Medical Report fee – variable

Timescale

On average preparation of the application for deputyship is likely to take in the region of six to eight weeks. The timescale for the court to process the application is variable.