

Our Probate Charges

Our team has over 20 years of collective experience in delivering high quality work in all matters relating to probate work. The team has particular expertise in acting for executors needing assistance with administration as well as high value estates/ inheritance tax matters.

Diane Burke, principal solicitor supervises all work undertaken at the firm. Please see the 'about us' section of this site for more details of our team members and their qualifications.

It is very difficult with probate charges to offer a one size fits all quotation as each family and situation is different. We invite you to telephone or email our offices in order to obtain an exact, bespoke quotation and explanation of our fees based upon your exact circumstances. However, in order to give you an idea of our charges and the various disbursements involved, we have set out below the costs for a more straightforward uncontested probate estate administration.

VAT is payable and is shown at the current rate of 20%, for illustrative purposes. VAT rates can be found at www.gov.uk.

Below is an example of Estate Administration, including applying for Probate, of an estate where there is a valid Will, appointing 2 Executors who are also the only beneficiaries and there are no disputes or claims against the estate. The estate has a property valued at £175,000 and bank accounts with £45,000 total.

When dealing with estate administration we work on a time spent basis. We set a credit limit at the outset to ensure that both ourselves and you have an estimate of the overall cost of the work. Our fees* cover all of the work required to value the estate, apply for probate (including Inheritance Tax forms), collect in the assets, make distributions and prepare estate accounts. We can handle the full process for you.

Solicitor fees and disbursements (illustration)

• Legal fees credit limit	£3000.00
• VAT payable on legal fees	£600.00
• HM Probate Registry fee	£273.00
• Copy Probate fees	£1.50
• Bankruptcy searches (£2 per person)	£6.00
• Identity check fee x 2 people	£28.68
(£11.95 +VAT £2.39, total £14.34 per person)	
•Estate search (if necessary)	£186.00
(£155 +VAT £31, total £186.00)	

Estimated total: **£4,095.18**

Disbursements are costs related to your matter that are payable to third parties, such as Probate Registry fees. We manage the payment of the disbursements on your behalf to ensure a smoother process.

Inheritance Tax

This depends on the value of the estate, the personal circumstances of the person that has died and the amount of any lifetime gifts. You can find information about the calculation for inheritance tax on the Revenue's website. We will calculate the amount you need to pay and will advise you accordingly. As a general rule of thumb, an estate valued at less than £325,000 does not have inheritance tax to pay.

* Our fee assumes that:

- a. the estate is concluded in a timely manner and no unforeseen complication arises.
- b. all parties are co-operative and there is no unreasonable delay from third parties providing documentation.
- c. no trustee act notices (advertised in a local paper and London Gazette) are required. Additional disbursements may apply (approx. £350) if trustee act notices are required. These can protect against unknown creditors and we will advise if they are likely to be required.
- d. you respect a fair usage policy in relation to the number of telephone calls and emails requesting updates.
- e. Whenever any of the following scenarios apply our legal fees will be increased :- Inheritance Tax is payable; there are in excess of six bank/ building society accounts; there is more than one property; there are intangible assets (such as intellectual property rights); there are more than four beneficiaries; there are disputes between beneficiaries; the estate comprises stocks and/ or bonds; we are asked to act as executor; assets are located outside of the UK.
- f. Dealing with the sale or transfer of any property in the estate is not included. Estate Agents may need to be instructed to provide a valuation for the property and they may charge a professional fee for their services.
- g. Where income tax/ capital gains tax/ corporation tax/ VAT returns are required we will seek the services of a mutually agreeable accountancy service who will charge separately for their professional fees.

How long will this take?

On average, estates that fall within this range are dealt with within 9-12 months depending on when the Property is sold. See below for an outline of the Stages involved. The timeframe is an indication only as many steps require information from third party organisations, which will vary in timescale and over which we have no control. For example the Probate Registry sets a timeframe for contacting them to chase any progress updates, which may range from 8-16 weeks.

Stages of the process

The precise stages involved in an estate administration vary according to the circumstances.

However, below we have suggested some of the key stages:

- Take your instructions and give you initial advice
- Contact asset holders such as banks and building societies to notify them of the death, freeze accounts and obtain valuations
- Arrange valuations of residential property
- Conduct searches
- Arrange payment of the funeral invoice
- Prepare the asset schedule
- Prepare Inheritance tax forms
- Arrange payment of any Inheritance tax due
- Meet with you to go through the Oath (Legal Statement) for Executor and asset schedule
- Submit the application for probate
- Receive the Grant of Probate
- Submit the Grant with the withdrawal/ transfer forms to the various banks and financial institutions
- Make interim cash distributions
- Liaise with estate agents and property solicitor to sell or transfer any property
- Consult with accountants to finalise tax affairs
- Prepare estate accounts and submit to you for approval
- Make final distribution