



UNCONTESTED PROBATE PRICES AND SERVICES

1. Estimated Fees

- 1.1. It is very difficult to provide an estimate of fees in respect of an uncontested probate matter as we do not know how much time it will take to complete the administration of an estate. The number of hours will depend on the particular circumstances of the case (including the size and complexity of the estate) and any issues which may arise during the course of the administration process.
- 1.2. Our charges will be calculated by reference to the time spent by the relevant fee earner in dealing with the matter and will be based on this firm's hourly charge out rates, which range from £150 per hour for a paralegal to £400 per hour for a partner. A list of hourly rates is contained in our Terms of Business which will be provided to you once we have received your instructions.
- 1.3. The best guide we can give you is that our fees for an estate worth up to £1,000,000 will be in the region of £2,500-5,000 whereas our fees for an estate worth over £1,000,000 will be around 1% of the gross value of the estate.
- 1.4. We will provide you with regular costs updates at each stage of your case and endeavour to let you have an estimate of the total cost of your case when possible.
- 1.5. Please note that all fees are exclusive of VAT and any out-of-pocket disbursements incurred with third parties (see paragraph 2 below).

2. Disbursements

- 2.1. On a standard transaction, we anticipate incurring the following disbursements:

Description	Cost
Land Registry title documents	£3.00 each
Bank transfer fee	£18.00 (inc VAT) each
Bankruptcy search	£2.00 per person
Chattels valuation (on average)	£200-500
Probate court application fee	£215
Copies of Grant of Probate	£1.50 per copy
Oath fees	£5-10 per executor/administrator
House/flat valuation (on average)	£500-700

- 2.2. The Probate court application fee is only payable if the value of the estate is over £5,000 and is subject to change. You can ascertain the current fee using the link below:

<https://www.gov.uk/applying-for-probate/apply-for-probate>

- 2.3. Please note that this is simply a guide and disbursements can vary from case to case. If there are any other disbursements, we will advise you of these before incurring the cost of them.



3. Services Included

3.1. In uncontested probate matters, our fees include the following services:

- (a) Ascertaining all the assets and liabilities of the deceased at the date of death and their correct market value.
- (b) Preparing a schedule of assets and liabilities for the executors to check over.
- (c) Identifying the legally appointed executors or administrators and beneficiaries of the estate.
- (d) Obtaining the relevant documents required to make a probate application.
- (e) Completing the probate application and the relevant HMRC Inheritance Tax (IHT) form(s).
- (f) Drafting the Oath for the executor.
- (g) Providing you with the draft IHT forms and executor's Oath for approval.
- (h) Once the drafts are approved, sending you the final versions of the documents and arranging for you to swear the Oath.
- (i) Submitting the Will, Oath and IHT forms to the Probate Registry for a Grant of Probate and providing you with copies of the same.
- (j) Dealing with any enquiries raised by HMRC in relation to the IHT return, and arranging payment of any IHT due.
- (k) Once the Grant has been obtained, collecting all assets, paying any legacies and discharging all liabilities of the deceased.
- (l) Ascertaining the balance of the estate and distributing it or holding it in trust in accordance with the terms of the Will.
- (m) Preparing estate accounts setting out full details of the administration.

4. Services Not Included

4.1. Our fees do not include any of the following:

- (a) A partner of the firm acting as an executor or trustee of the estate or as a court appointed administrator.
- (b) Selling a property which forms part of the estate.



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- (c) Reporting to HMRC if further assets are discovered after the submission of the appropriate forms.
 - (d) Negotiating with HMRC in respect of the valuation of any assets.
 - (e) Dealing with any claims made against the estate or legal disputes between beneficiaries (whether in relation to the division of assets or otherwise).
 - (f) Providing advice on the Income Tax and Capital Gains Tax affairs of the deceased prior to death or of the estate.
 - (g) Dealing with disclaimers and deeds of variation.
 - (h) Dealing with assets in foreign jurisdictions.
 - (i) Carrying out any other work not specifically identified in paragraph 3 above
- 4.2. Please note that it is your obligation to employ appropriately qualified third parties to provide such specialist advice as may be needed.
- 5. Fee Increases**
- 5.1. The guide as to fees is based on the following factors and we reserve the right to increase or decrease our fees as appropriate:
- (a) There is a valid Will.
 - (b) The estate does not include any assets in foreign jurisdictions.
 - (c) There is no more than one property.
 - (d) There are no more than two bank/building society accounts.
 - (e) There are up to three beneficiaries.
 - (f) There is no dispute between the beneficiaries as to the division of assets.
 - (g) There is no IHT payable and the executors do not need to submit a full account to HMRC.
 - (h) There are no claims made against the estate.
- 5.2. If we are instructed to provide any of the services listed in paragraph 4.1 above, or if the matter becomes more complex than originally foreseen as a result of the following or otherwise, our fees are likely to increase:
- (a) Domicile issues.
 - (b) Interests in trusts or other estates.



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- (c) Intangible assets such as digital assets (including crypto) or intellectual property.
- (d) The number of beneficiaries we need to communicate with.
- (e) The speed at which third parties respond to our requests for information.
- (f) Issues raised by HMRC which may cause extra work to be undertaken.
- (g) Determining appropriate parties in intestacy.
- (h) Investigations into missing family members.
- (i) The amount of assistance the beneficiaries require from us.

6. Timescales

Uncontested probate matters can take anywhere between 6 months and 8 months from receipt of instructions to be completed. This is simply an estimate as there are many aspects of such a matter over which we have little or no control.

7. General

- 7.1. All uncontested probate matters will be handled on a day-to-day basis either by one of the partners, a solicitor, or a trainee solicitor/paralegal under the supervision of one of the firm's private client partners.
- 7.2. Clients will be notified at the outset of the matter of the name and details of the particular fee-earner handling their matter.
- 7.3. If you want further information about the qualifications and experience of the fee earner dealing with your matter or the supervising solicitors, please visit our website.
- 7.4. It is this firm's policy to request monies on account from time to time to cover disbursements before incurring the cost of them or fees.