



## Fixed Fee Probate Applications

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\*The estimates given in this document are to be read in conjunction with our terms of business, a copy of which can be requested from us by post or email. They do not include any administrative fees or disbursements which are required in verifying your identity as part of compliance and anti-money laundering requirements

## Short Form Grant of Representation Application

This is for estates where the personal representative(s) have obtained all of the necessary information required to complete the probate papers and would like us to prepare the documentation and make the application for a grant of representation. We will then hand over the grant of representation to the personal representative(s) so that they can administer the estate.

### What is included?

- An initial meeting to take instructions and necessary information to complete the paperwork and set up the file
- Providing you with our probate questionnaire for you to give us the information needed to complete the probate papers
- Preparation of either the paper application form or online application, including the legal statement
- Drawing up a schedule of assets and liabilities
- A meeting to finalise and sign the probate papers
- Submission of the application to the Probate Registry and dealing with any \*standard requisitions they may raise.
- Receipt of the grant of representation which we will hand over to you for your use.

### How much will this service cost?

Legal fees	£850 plus vat (vat £170)
Probate Registry fee	£273 (£0 fee if estate net value is less than £5,000)
Copy probate fee	£1.50 per sealed copy

All of the fees listed above except the legal fees are disbursements (i.e fees that we pay out on your behalf to third parties, such as the Court)

### How long will this service take?

Approximately 14-20 weeks

If we are provided with all of the information to draft the paperwork then on average, it takes 2-3 weeks from the initial meeting to have the paperwork ready to sign and have the next meeting. The Probate Registry usually takes around 8-16 weeks to issue a grant if no requisitions are raised.

# Long Form Grant of Representation Application

This is for estates where the personal representative(s) have obtained all of the necessary information required to complete the probate papers and would like us to prepare the documentation and make the application for a grant of representation. We will then hand over the grant of representation to the personal representative(s) so that they can administer the estate.

This is for a non-taxable estate or an estate where the personal representatives can provide HMRC with the required instalment of inheritance tax at the time of submitting the application.

## What is included?

All of the points described in 1. above and in addition:-

- Preparation of the IHT400 HMRC form and all necessary supporting schedules
- Preparation of either the paper application form or online application, including the legal statement
- Submission of all HMRC forms and supporting documentation to HMRC
- Submission of probate application to the Probate Registry.
- Receipt of the grant of representation which we will hand over to you for your use.

## How much will this service cost?

Legal fees	£1,200 plus vat (vat £240)
Probate Registry fee	£273
Copy probate fee	£1.50 per sealed copy

All of the fees listed above except the legal fees are disbursements (i.e fees that we pay out on your behalf to third parties, such as the Court)

## How long will this service take?

Approximately 16-22 weeks

If we are provided with all of the information to draft the paperwork then on average, it takes 2-3 weeks from the initial meeting to have the paperwork ready to sign and have the next meeting.

HMRC can take anywhere between 2-6 weeks to stamp and forward the necessary paperwork to the Probate Registry. Once received, the Probate Registry usually takes around 8-16 weeks to issue a grant if no requisitions are raised.

### **What is not included in our fixed fee probate services?**

Our fee for both the short form and long form types of application does not include us informing all banks/building societies etc. of the death, providing death certificates and receiving and collating the asset valuations.

We will not collect in any assets or deal with any aspect of the administration of the estate other than obtaining the grant of representation on the personal representative(s)' behalf.

\*Standard requisitions can be resolved without the need to obtain further evidence. They do not include requisitions requiring, for example, affidavits of foreign law/due execution/plight and condition. We will advise you before we draw up the application if we think these may be necessary and will advise of the estimated costs.

We will not instruct valuers or estate agents to provide valuations of property, nor will we instruct accountants or tax advisors to provide detailed accounts/reports/tax calculations for inheritance tax purposes or otherwise. If this information is required this will need to be supplied to us in readiness for us to draft the IHT forms.

## Small Estate Example – Obtaining the grant & administering the estate

We will always ask you to provide us with all of the estate documentation in the first instance so that we can give you a good estimate of the costs of the administration. The exact costs will depend on the individual circumstances of the matter and could range significantly. However, below we provide an example estimate for dealing with the whole probate and administration process of a relatively straightforward small estate.

### What is included?

All of the points described in 1. above but in addition:-

- Notifying all relevant organisations of the death and providing copy death certificates
- Collating necessary death valuations and other information in order to draft the probate application
- Drafting the probate application – see 1. Above
- Applying for S27 Trustee Act notices (if necessary)
- Completing closure forms and collecting in the proceeds of the assets/accounts
- Paying normal debts and liabilities including refunds to DWP for overpayment of benefits
- Drawing up estate accounts and submitting to the executors for approval
- Notifying legatees of their entitlement, requesting and receiving their ID, obtaining bankruptcy searches, arranging payment
- Notifying residuary beneficiaries of their entitlement, requesting receiving their ID, obtaining bankruptcy searches, arranging interim and final distributions, sending copies of the estate accounts
- If necessary, we will also account to HMRC at the end of the administration for income tax on any interest earned during the administration period.

This example of fees is for estates where:-

- There is a valid will
- There are no more than 2 executors
- There is no more than one residential property
- There are no foreign assets
- There are no more than 5 separate building societies or banks to notify
- There are no other intangible assets
- There are no more than 2 legacies
- There are no more than 3 residuary beneficiaries
- There are no disputes between executors or beneficiaries. If a dispute arises this will increase costs
- There is no inheritance tax payable and a full inheritance tax account does not need to be submitted to HMRC
- There are no claims against the estate

### How much will this service cost?

Legal fees	£3,500-£4,000 plus vat (vat £700-£800)
Probate Registry fee	£273
Copy probate fee	£1.50 per sealed copy
Trustee Act Notices	Approximately £250.15 plus vat (vat £50.03) – this helps protect executors against unexpected claims by creditors
Land Registry documents	£8 plus vat (vat £1.60)
Bankruptcy Search fees (UK)	£3.20 plus vat (vat £0.64) per beneficiary (fees will be higher if the beneficiary is located abroad)

All of the fees listed above except the legal fees are disbursements (i.e fees that we pay out on your behalf to third parties, such as the Court)

### How long will this service take?

Approximately 12 months

This time scale can range significantly because it is dependent on the speed of response by third parties.

If we are provided with all of the information to draft the paperwork then on average, it takes 4-6 weeks from the initial meeting to have the paperwork ready to sign and have the next meeting.

The Probate Registry usually takes around 8-16 weeks to issue a grant if no requisitions are raised.

### What might increase the fees?

Examples include:-

- If there is no will
- If we are required to notify additional banks/organisations of the death for example, life insurance or additional bank accounts come to light throughout the course of the administration that we were not made aware of at the outset.
- If we are required to trace a beneficiary because we do not have sufficient details to contact them.
- If the estate consists of any stocks and shares and we are required to calculate the values, notify the relevant registrars and deal with the sale or transfer to a beneficiary.
- The conveyancing costs related to selling or transferring a property that forms part of the estate are not included in the estimate. Our experienced residential property team will be able to provide a fixed fee quote for conveyancing.

- If it becomes necessary to obtain an overseas Grant of Probate or have the UK grant resealed in order to deal with foreign assets.

If we anticipate that the fees are going to increase, we will advise you during the course of our instruction and provide you with a revised estimate wherever possible.

This estimate is for indicative purposes and is not intended to be a quotation of fixed fees. Whilst the estimate will give you a good insight into the likely costs of instructing us in the administration, we will provide you with an estimate **to suit to your specific circumstances**.

## Our Probate & Estate Administration Team

For further information, click the links below for the individual profile pages:-

[Richard Denby](#) is a Director of Progression Solicitors and is a qualified solicitor and a Trust and Estates Practitioner (TEP).

[Pamela Horobin](#) is a Director of Progression Solicitors and is a qualified solicitor and a Trust and Estates Practitioner (TEP). She has many years' experience of all types of probate matters and has supervisory responsibility for all probate matters.

[Hannah Booth](#) is a member of the Chartered Institute of Legal Executives and is a Senior Associate member of the firm. She has extensive experience of dealing with all types of probate applications.

[Pollyanna McNeilly](#) is a solicitor and an Associate member of the firm. She has extensive experience of dealing with all types of probate applications.

### Trainee Solicitors

We normally have at least one trainee solicitor in the firm at any one time providing assistance to other fee earners in probate matters. All trainee solicitors are closely supervised by qualified fee earners.