

HAROLD BENJAMIN

PROBATE APPLICATION ASSISTANCE SERVICE - FIXED FEE (INCLUDING VAT)

Fees including VAT Fee Range

(A) Fixed Fee £1,800

Average Time Spent = 3-6 months

Disbursements non-VAT bearing

(B) Probate Court application fee £155

(C) Office Copy of the Grant of Probate
(10 copies @ £1.50p each) £15

TOTAL (A) + (B) + (C)..... £1,970

Optional Additional Fee

(D) Harold Benjamin Letter Pack..... £100

If you require a set of standard letters in Microsoft Word format, designed so that you can write to the various companies for the information that is needed to obtain probate, please request these.

Optional Additional Disbursements including VAT

If you wish to consider these services we can explain each of them to you so that you can decide whether to use them

(E) Landmark Full Asset Search £186 + HB admin fee of £36 £222

(F) Certainty Register Search (if no Landmark Asset Search)..... £91.20

(G) Certainty REACH Search £114

TOTAL (A) - (G)..... £2,497.20

Work Included

1. Providing you with a comprehensive Probate Questionnaire to assist you in understanding the information we need you to provide us with. You may find it useful to make use of our Letter Pack to aid you in collecting this information
2. Reviewing your completed Probate Questionnaire with all the relevant documents and information and requesting any additional information or clarification as necessary from you. You will be responsible for providing us with all the necessary information to make the application for a Grant of Representation
3. Once we have all the required information, we will prepare and forward to you drafts of:-
 - (a) the Inland Revenue form IHT205 (and IHT217 if applicable); and
 - (b) an executor's Statement of Truth ("SoT")
4. Once the drafts are approved we will send you the final versions for you to execute the SoT and we will require you to send us the original will (if not already stored by us)
5. Once you have signed these documents we will then submit them to the Probate Registry. Usually the Probate will be granted within 2-4 months of the application
6. Once the Grant is provided by the Probate Registry we will send this on to you for use in dealing with the estate

Work NOT Included

To help avoid any misunderstanding, we bring to your attention the fact that we are not assisting you with, or providing advice on the following:

1. The ascertaining of the value of assets and liabilities in the estate on your behalf
2. Collection of the assets in the estate
3. Preparation of Estate Administration Accounts and distribution of the estate
4. If further assets are discovered after the submission of the IHT205 this information must be reported to HM Revenue & Customs. This is your responsibility. If this occurs after the completion of the submission of the IHT205, we can assist you and a separate client care letter will be sent to you
5. Completion of an IHT400 and supplemental forms
6. The deceased's tax affairs prior to death
7. The tax affairs for the estate
8. Anything else not specifically identified under Work Included above

This service is not available if any of the following apply, whereby the deceased:

1. Made gifts or gave up the right to assets held in trust for them totalling more than £150,000
2. Made a gift where they continued to benefit from or had some right to benefit from part or all of the assets (such as a property)
3. Made a gift whereby the person receiving it did not take full possession of it
4. Had a right to benefit from a Trust
5. Owned or benefitted from assets outside the UK
6. Paid premiums on a life insurance policy that was not for their own benefit or passes outside of their estate
7. Changed or disposed of their private pension within the two years prior to their death
8. OR where residence nil rate band or transferable residence nil rate band is to be claimed (because this requires an IHT400 and supplemental schedules)

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9. OR in any of the set circumstances where probate applications must be made on paper (rather than electronically via MyHMCTS)