

Probate work (excluding court cases regarding disputed estates)

The First Step

Whichever Service you select below, we will always need to meet with you initially. We can then provide you with your options and advice as to the terms of the Will (or the intestacy rules if there is no Will in place) and your duties and obligations as Personal Representative(s). A Personal Representative is the person responsible for administering the estate whether as Executor (if there is a Will) or as Administrator (if there is no Will).

Your meeting with one of our experts usually takes just over an hour and from that meeting we will be able to work with you in accordance with any of the services listed below to ensure that during this stressful period, our trusted advisors are on hand to guide, advise and reassure you. Based on your initial meeting, your matter will be assigned to an expert in the team with the appropriate level of qualification and expertise and you will be made aware of who will be dealing with your matter on your behalf along with details of their hourly rate and the arrangements to be put in place to supervise their work.

Our initial meeting is charged on the basis of the time spent with you and we always let you know who you will be meeting and how much we charge you for their time. Following the meeting, if you decide to instruct us to undertake any of the services below, the costs of the meeting will form part of the overall quote we will provide you. If you choose to take our advice only we will only charge for the time spent with you at the meeting. Provided we have sufficient time in advance of the meeting, you will receive a letter from the expert you will be meeting confirming their details including their hourly rate (their hourly fee).

Professional Fees

Our professional fees will vary depending upon the terms of the Will (or if the deceased died intestate, the extent of their family tree), the value and complexity of the estate and the type of assets they owned. Our professional fees do not include VAT, this will be charged in addition.

Our overall professional fees for dealing with the administration of an estate are usually calculated on a time spent basis of the expert or experts helping you. This is opposed to a fixed fee arrangement whereby the total professional fees is set at the beginning of the matter. The hourly fee of the expert helping you is broken down into minimum 6 minute “units” of time.

The hourly rates of our experts are as follows:

-  Paralegal from £120 to £135
-  Solicitor from £150 to £190
-  Associate from £200 to £230
-  Legal Director from £225 to £245
-  Partner from £290 to £310

We always ensure that the right person at the right level manages your matter and the appropriate level of supervision is on hand.

It is very difficult to provide an overall quote for our professional fees without knowledge of the estate and what it contains, however, as a guide, our professional fees for full estate administration will typically start from £3,000 – £5,000 for a very straightforward estate whilst fees for complex estates can exceed £20,000. The overall costs associated with your particular matter is likely to fall within this range and we can narrow the range of costs down for you more accurately once we have been made aware of the work that will be required. Sometimes, large and complex estates can exceed this £20,000 fee.

If you simply want us to obtain the Grant of Representation (often called a “Grant of Probate”) on your behalf, our charges will range as follows:

- ✦ from £950 and £1,500 if the simpler Inheritance Tax form is required (for smaller, non-Inheritance Tax bearing estates); or
- ✦ from £2,500 to £4,000 if the more complex Inheritance Tax form is required (for larger, Inheritance Tax bearing estates).

Once we have established the relevant details about your particular matter, and established the service you require from us, we will be able to provide you with a more accurate indication of our likely professional fees.

Due to the number of possible considerations which can impact on what work we need to carry out for clients it is often impractical to provide you with a maximum estimate of the costs, for example, the factors that determine our professional fees include:

- ✦ The terms of the Will (or extent of family tree);
- ✦ The number, location and complexity of assets;
- ✦ The number, location and type of beneficiaries;
- ✦ Whether the estate attracts Inheritance Tax and whether any reliefs are available;
- ✦ Whether there are family members or friends available to undertake non-legal tasks within the administration process;
- ✦ Whether the Personal Representatives encounter difficulties with dealing with Beneficiaries or other third parties connected with the estate;
- ✦ Whether any advice is required as to likely claims against the estate;
- ✦ If there is an asset in the estate requiring specialist attention;
- ✦ If the DWP issue a claim against the estate
- ✦ Whether HM Revenue & Customs investigate the deceased’s lifetime tax affairs
- ✦ Whether HM Revenue & Customs investigate the valuations placed on assets for Inheritance Tax/Capital Gains Tax purposes. This can involve protracted negotiations with third party professional valuers whose costs will be in addition to our own.

It is often impossible to know whether any of these factors will be relevant at the outset of the matter and they may only become known once a quote has been provided and a degree of work has already been undertaken on your behalf. As soon as we are aware of any factors that will impact on the level of professional fees and/or disbursements (see below) payable, we will notify you and provide you with an indication of the likely impact.

Costs can be reduced considerably if family members are prepared to help with the non-legal tasks such as clearing personal items, meeting with estate agents and transferring utility accounts. These aspects can often be time-consuming but do not usually require our expertise.

Grant Only Service

Our Grant Only Service can be a quick, simple and cost effective way to obtain a Grant of Representation. It is usually only advisable to use this service where an estate is straightforward and the personal representatives are confident with dealing with the ongoing administration themselves. However, we can provide general advice as to the next steps in the administration process once the Grant of Representation has been obtained which will incur additional fees.

Using this service, our experts will draft the documents you need in order to obtain the Grant of Representation using information provided by you. We will let you know what information we need.

Our Grant Only Service fees are:

- ✦ Where an estate form IHT205 is submitted to the Probate Registry – £950 to £1,500 plus VAT

- ✦ Where a full estate form IHT400 is submitted to HM Revenue and Customs – £2,500 to £4,000 plus VAT

Bespoke Service

Our Bespoke Service is ideal for those who need more help getting started with the estate administration process but who still feel confident in dealing with the estate once the Grant of Representation is obtained. We find it most appropriate when Inheritance Tax is payable as we can take the worry out of the process by ensuring the correct amount of Inheritance Tax is paid and on time.

In addition to the work that we will carry out under the Grant Only Service, we will also carry out the initial fact finding to establish the extent of the assets and liabilities of the estate and we will contact the potential beneficiaries to provide them with the information they need at the outset.

Having obtained the Grant of Representation for you, you then undertake the majority of the remaining necessary tasks yourself, however, we are on hand at your request to step in and take the burden away by carrying out certain elements of the work we would ordinarily offer within our Premium Service. Of course, we will advise you as to the likely additional costs that will be incurred at the appropriate point in time so that you can make the right decision for you.

Premium Service

Our most popular service, the Premium Service is designed to ensure that we deal with everything that the administration of an estate process will usually entail. In addition to the tasks undertaken within our Bespoke Service we will also see the administration of the estate through to the end with you.

Estate Expenses/Disbursements

Below is an extensive list of the types of third party expenses (also known as disbursements) that may be incurred during your matter which are in addition to our professional fees. The list is not exhaustive but is an indication of the common types that we often come across. Not all of these will be incurred during the administration of every estate – we will be able to give you a clearer idea as to what to expect once we have met with you.

Details of Disbursement/Expense	Likely Cost	VAT Chargeable?	When due
Probate Registry Application Fee	£155 (plus £0.50 per Court Sealed Copy provided)	No	Upon application for Grant of Representation
Probate Registry Settling Fee	£12 (per settled Oath)	No	Upon request to the Probate Registry
Personal Representative's Swear/affirmation Fee	£5 per Personal Representative (plus £2 per exhibit)	No	Upon attending with solicitor to swear/affirm the Oath
Office Copy Entries – Land Registry	£3 per title £3 per plan (if required)	Yes	Upon application to the Land Registry
Property Valuation Fee	£150 to £500 (estimated)	Yes	Upon receipt of the valuation report
Asset Valuation Fee (such as chattels and business interests)	£150 to £2,500 (estimated –	Yes	Upon receipt of the valuation report

	dependent on asset type)		
Genealogy Fees	£dependent on instructions provided	Yes	Upon receipt of their findings
Beneficiary Bankruptcy searches	£2 per beneficiary (per distribution)	Yes	At the outset of the matter and upon each distribution to them
Foreign Beneficiary Bankruptcy searches	£dependent on jurisdiction of beneficiary	No	At the outset of the matter and upon each distribution to them
House Clearance Costs	£dependent on amount to be cleared	Yes	Upon completion of the house clearance
BACs Fees (electronic payment fees)	£10 for next day (dependent on amount) £30 for same day	Yes	Upon making payment
Estate Agent Fees	£dependent on value of property	Yes	Upon completion of the sale of the property
Copy Death Certificate Fees	£5 per copy	No	Upon registering the death
Section 27 Trustee Act notice fees	£150 to £300 (dependent on publication)	Yes	Upon placing the adverts
Unknown/dormant asset search fees	£dependent on instructions provided	Yes	Upon receiving their findings
Indemnity Fees (lost share certificates, lost policy documents)	£dependent on value of shareholding	Yes	Upon provision of the indemnity (usually when shares are to be sold/transferred)

Team details

Below is a list of fee earners within Shakespeare Martineau's Private Client team across the firm's offices together with confirmation of their respective hourly rates. You are likely to deal with more than one of the fee earners during your matter.

Name of Fee Earner	Job Title	Hourly rate (£) as at 26/11/18*
Clare Laird	Partner	310
Lesley Davis	Partner	310
Anne Tromans	Partner	310

Mark Dunkley	Partner	305
Suzanne Leggott	Partner	290
Virginia Harvey	Partner	290
Paul Horton	Partner	290
Verity Kirby	Legal Director	245
Hannah Tait	Legal Director	245
Rahul Kotecha	Legal Director	225
Michael Brown	Associate	230
Matt Parr	Associate	230
Ben Sharp	Associate	230
Jayne Leedham	Associate	230
Sarah Brack	Associate	200
Elaine Hart	Legal Executive	195
Lisa Franklin	Legal Executive	150
Kathleen Ryan	Solicitor	190
Reiss Taylor	Solicitor	175
Hannah Murray	Solicitor	165
Paul McMaster	Solicitor	150
Emily Izzo	Solicitor	150
Victoria Taylor	Solicitor	150
Nicola Leeson	Paralegal	135
Nicola Bleakley	Paralegal	135
Jade Vickers	Paralegal	130
Heather Griffith	Paralegal	125
Georgina Luckman	Paralegal	120

*All hourly rates are subject to annual review and the hourly rates of the fee earners managing your matter will be highlighted in our client engagement correspondence at the outset of the matter

Further details of the members of our team can be found on the team information sheet [here](#).

Click [here](#) for a comparison of the services we offer.