

Applying for the grant, collecting and distributing the assets in relation to a taxable or non-taxable estate

We will handle the full process for you. This quote is for estates where:

- There is a valid will, or the deceased is intestate
- Any property
- There are various bank accounts, investments and assets including foreign assets.
- There are no other intangible assets
- There are no disputes between beneficiaries on division of assets. If disputes arise this is likely to lead to an increase in costs
- There are no claims made against the estate

Fees including VAT

Wills

1. Single Will £312
2. Double (mirror Wills) £540

LPAs

1. 1 LPA £600
2. 2 LPA £800
3. 4 LPA (Husband & wife) £1,000
4. Court fee of £82 per document

EPA/COURT OF PROTECTION

1. Register an EPA £600 (plus a court fee of £82)
2. Court of Protection application £1,620
(plus a court fee of £408)

Probate

1. Probate IHT 205 £1140
2. Probate IHT 400 (non-taxable) £1,320
3. Probate IHT 400 (taxable) £1,800
4. Full Administration hourly rate £360
5. Apex as Executor hourly rate £384

Other

Disbursements

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

These are likely to include the following:

- Electronic ID verification of executors of up to £4.40 plus VAT per executor
- Probate application fee of £309
- From £130.00 to £170.00 Post in The London Gazette and Local Newspaper
- Bankruptcy - only Land Charges Department searches (£10 per beneficiary)
- Asset and liability searches from £230.00 to £300.00
- £7 Swearing of the oath (per executor) subject to this requirement no longer being necessary once the Probate Registry issues its new statement of truth documents.

Potential additional costs

- If there is no will or the estate consists of any share holdings (shares, stocks and bonds) there is likely to be additional costs that could range significantly depending on the estate and how it is to be dealt with. We can give you a more accurate quote once we have more information.
- If there are assets subject to Business Property Relief, Charitable exemptions or trusts there is likely to be additional costs that could range significantly depending on the estate and how it is to be dealt with. We can give you a more accurate quote once we have more information.
- If any additional copies of the grant are required, they will cost £1.50 each (1 per asset usually).
- Dealing with the sale or transfer of any property in the estate is not included.

Key stages

- Initial meeting with executors to ascertain estate
- Investigating confirmation of assets and liabilities from all organisations
- Preparing an Inheritance Tax Account when required
- Draft application for Probate and seek approval from executors
- Obtain Grant
- Send Grant to institutions in order to obtain/transfer assets
- Pay outstanding liabilities and seek confirmation from HMRC/DWP that no further liabilities remain
- Deal with sale of property
- Distribute estate

How long will this take?

On average, estates that fall within this range are dealt with within 6 - 12 months (depending on whether it is necessary to wait a 6-month period from the date of issue of the Grant of Probate and the time required to sell a property). Typically, obtaining the grant of probate takes 12 - 16 weeks.

Collecting assets (excluding the time taken to sell a property) then follows, which can take between 8 -12 weeks. Once this has been done, we can distribute the assets, which normally takes 6 - 8 weeks.