

PROBATE

Team/Individual details

Our team has over 5 years of collective experience in delivering high quality work in all matters relating to Wills and Estate Administration. The team has particular expertise in high value estates and inheritance tax matters.

We have two members of the team who may work on your matter. Regardless of who works on your matter, they will be supervised by Mrs Jespal Phull, Sole Practitioner and Head of probate and estate administration.

Jespal Phull – Sole Practitioner:

Jespal Phull is the head of our team and has over 17 years' experience in private client work, specialising in wills and probate and family law. Jespal has been working in this area since she set up her practice over 4 years ago and has helped numerous families and individuals.

Jespal qualified as a solicitor in 2001 after gaining a Second Class Law Degree from the University of Wolverhampton and completed the Graduate Diploma in Law and Legal Practice Course with Commendation. She completed her training contract at John Morgan Solicitors and worked at Legal 500 firm MFG Solicitors and different firms before opening her own practice in 2014.

Jespal also speaks fluent Punjabi.

Jespal has also completed several professional development courses in probate and estate administration and continues with her professional competence development on a yearly basis.

Amandeep Singh Phull – Trainee Solicitor

Amandeep has a Law Degree from Wolverhampton University and has completed the Graduate Diploma in Law and the Legal Practice Course at the BPP law school in Birmingham. Amandeep began his training contract with us in January 2018 and will work in our Wills and Probate Department.

PROBATE SERVICES AND PRICING: 2018 - 2019 (We review our rates each year and notify our clients of any changes).

APPLYING FOR THE GRANT OF PROBATE: (uncontested) then collecting and distributing the assets

We can handle the full process for you to include applying for the Grant of Probate and then to deal with the administration and distribution of the estate.

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

- There is a valid will
- There is no more than one property
- There are no more than 6 bank or building society accounts
- There are no other intangible assets
- There are one to eight beneficiaries
- There are no disputes between beneficiaries on division of assets. If disputes arise this is likely to lead to an increase in costs
- There is no inheritance tax payable and the executors do not need to submit a full account to HMRC
- There are no claims made against the estate.

Work Undertaken:

- Meet with you to obtain initial instructions and to discuss the estate.
- Corresponding and liaising with the relevant institutions to obtain the required information to complete the probate forms.
- Prepare the probate papers including the oath, revenue forms and any necessary affidavits and notices.
- Meeting with you to sign the probate papers and thereafter to submit the papers to the probate registry.
- Collection and distribution of the estate and liaising with HMRC to check all matters are up to date.

We anticipate this work to be carried out will take between 12 to 24 hours. The hourly rate of our fee-earners range from between £100.00 and £150.00 (no vat) based on experience.

Our total costs range from between £1,200 and £1,800.00 (no vat).

The exact cost will depend on the individual circumstances of the matter. For example, if there is one beneficiary and no property, costs will be at the lower end of the range. If there are multiple beneficiaries, a property and multiple bank accounts, costs will be at the higher end.

Disbursements are not included in our fees and include:

- Probate application fee of £155.00
- £7 Swearing of the oath (per executor)
- If any additional copies of the Grant are required they will cost £0.50p (1 per asset usually)
- Additional disbursements may be required depending on individual requirements as follows:
 - Bankruptcy-only Land Charges Department searches (£1 per beneficiary)
 - £62.15 plus vat Post in The London Gazette – Protects against unexpected claims from unknown creditors.
 - £185.00 plus vat Post in a Local Newspaper – This also helps to protect against unexpected claims.

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.

Potential additional costs

- If there is no will or the estate consists of any share holdings (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.
- Dealing with the sale or transfer of any property in the estate is not included.

How long will this take?

On average, estates that fall within this range are dealt with within 3-6 months. Typically, obtaining the grant of probate takes 6-8 weeks. Collecting assets then follows, which can take between 6-8 weeks. Once this has been done, we can distribute the assets, which normally takes 6-8 weeks.

PROBATE SERVICES AND PRICING (fixed fee) 2018 -2019

(We review our rates each year and notify our clients of any changes.)

APPLYING FOR THE GRANT OF PROBATE ON YOUR BEHALF: (uncontested) This applies to cases where:

There is a valid Will

The estate is below the nil rate band (currently £325,000)

There is no inheritance tax payable and the executors do not need to submit a full account to HMRC.

All relevant information relating to the assets and liabilities of the estate are provided.

As part of our fixed fee we will:

- Provide you with a dedicated and experienced probate solicitor to work on your matter
- Identify the legally appointed executors or administrators and beneficiaries
- Accurately identify the type of Probate application you will require
- Obtain the relevant documents required to make the application
- Complete the Probate Application and the relevant HMRC forms
- Draft a legal oath for you to swear
- Make the application to the Probate Court on your behalf
- Obtain the Probate and securely send two copies to you

Our fees for obtaining the Grant of Probate only are £850.00 (no vat). This fee does not include the additional work to obtain the necessary estate information, administration and distribution of the estate assets. This work is undertaken on an hourly charge of between £100.00 and £150.00 (no vat) based on experience.

To apply for the Grant of Probate we will liaise and correspond with the institutions to obtain the necessary estate information in cases where:

There is no more than one property.

There are no more than six bank or building society accounts

there are no other intangible assets.

In addition to the Grant of Probate application fixed fee of £850.00, we anticipate an additional 3 to 4 hours of work is involved to correspond and to liaise with the various institutions. The hourly rate of our fee-earners range from £100 to £150.00 (no vat)

Our total costs including the Grant of Probate (fixed fee) are estimated between £1,150 and £1,300.0 (no vat). Our fees do not include the administration and distribution of the estate.

The exact cost will depend on the individual circumstances of the matter. For example, if there is one beneficiary and no property, costs will be at the lower end of the range. If there are multiple beneficiaries, a property and multiple bank accounts, costs will be at the higher end.

Disbursements are not included in our fees and include:

- Probate court fee of £155.00.
- £7 Swearing of the oath (per executor).
- If any additional copies of the Grant are required they will cost £0.50p (1 per asset usually)

Additional disbursements may be required depending on individual requirements as follows:

- Bankruptcy-only Land Charges Department searches (£X per beneficiary).
- £X Post in The London Gazette – Protects against unexpected claims from unknown creditors.
- £X Post in a Local Newspaper – This also helps to protect against unexpected claims.

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.

How long will this take?

Typically, obtaining the Grant of Probate takes 6-8 weeks.