



PROBATE SERVICES

PRICE TRANSPARENCY

OUR SERVICES

Work undertaken by our team of experts, including a number of STEP qualified members, cover a wide range of probate services including:

- Preparation of tax returns for the year to the date of death.
- Identification of the assets and liabilities of the deceased for inclusion in the Probate submissions.
- Preparation of Inheritance Tax accounts for submission to HMRC.
- Preparation of the Estate tax returns and dealing with the income tax and capital gains tax payable.
- Gather in the assets and settle the creditors and Inheritance Tax liabilities.
- Completing the Probate application and obtaining the grant of probate on your behalf.
- Deal with the distribution of the Estate in accordance with the Will.
- Provide Estate accounts in an easy-to-understand format.
- Provide updates throughout the process to keep the family/executors informed on the progress.
- Provide tax advice on future planning or rearrangements, such as deed of variations, where necessary.

FEES

Fees are charged on a time-cost basis, in accordance with a member of staff's level of skill and seniority.

Typical hourly charge out rates are as follows;

Team level	Rate
Partner	£515
Senior Manager	£255
Manager	£215
Senior	£130
Junior	£110

Our fees will vary according to both the complexity and volume of the work undertaken. Each Estate is considered on a case-by-case basis and a tailored quote will be provided once we have a full understanding of the individuals circumstances and the work required.

EXAMPLE

An Estate with a value up to £5 Million, where the deceased held a valid Will, consisting of;

- Main Residence Property
- 1-3 Investment Properties
- 1-3 Stocks & Shares Investment Portfolios
- Cash

We would estimate total costs of £3,000 - £10,000 in ascertaining the value of the estate at the date of death, completion of the necessary IHT forms, submission of the Probate application and obtaining the Grant of Probate.

Further costs, at our hourly charge rates, would apply for any additional services required. A full quote will be provided prior to engagement.

All charges are subject to the addition of VAT at 20%.



DISBURSEMENTS

These additional fees relate to the payments made to third parties on your behalf.

Service	Fee
Probate Application	£273
Copies of the Grant of Probate	£1.50 per copy
Post in the London Gazette & Local Newspaper	£300 (estimate)

Please note that the newspaper posts are not compulsory, but it is advisable to protect against unexpected claims made against the estate.

DURATION OF THE MATTER

On average, you can expect Estate work to be dealt with within 3 to 12 months. This, in any case, will be subject to the complexity of the Estate itself, the tax affairs and personal circumstances of the deceased, and the volume of services required.

The expected timescales are outlined below, please note these are typical timescales and are subject to change dependant on any difficulties identified throughout the process.

- Valuing the assets in the Estate – Up to 8 Weeks.
- Completion & submission of the Inheritance Tax forms and making an application to the Probate registry – Up to 12 Weeks.
- The Grant of Probate issued from the Probate registry, following application – Up to 8 weeks.
- Collecting and subsequently distributing the estate assets – Up to 16 weeks.
- Completion of Estate tax returns & Estate accounts – Up to 20 Weeks following receipt of the Grant of Probate.



COMPLAINTS PROCEDURE

If you would like to talk to us about how we can improve our service to you, or if you are unhappy with the service you are receiving, please let us know by contacting the firm's Senior Partner, Simon Massey or the Head of Legal Practice in a licensed firm, David Truman. We will consider carefully any complaint that you may make about our probate services as soon as we receive it and will do all we can to resolve the issue. We will acknowledge your complaint within five business days of its receipt and endeavour to deal with it within 8 weeks. Any complaint should be submitted to us by letter.

If we do not deal with it within this timescale or you are unhappy with our response you may of course take the matter up with our professional body the Institute of Chartered Accountants in England and Wales (ICAEW) and the Legal Ombudsman.

Complaints to the Legal Ombudsman should be made within six years of the act or omission or within three years of you becoming aware of the issue, and in either case within six months of our written response to your complaint to us. The contact details for the Legal Ombudsman are:

Letter: Legal Ombudsman, PO Box 6806, Wolverhampton, WV1 9WJ

E-mail: enquiries@legalombudsman.org.uk

Telephone: 0300 555 0333

Menzies LLP is licenced by the **Institute of Chartered Accountants in England and Wales (ICAEW)** to carry out the reserved legal activity of non-contentious probate in England & Wales.

Menzies LLP holds Professional Indemnity Insurance.

Menzies LLP probate advice accreditation reference number is **C001840915**.

Contact Menzies to discuss your probate and estates queries

To speak to a partner or for more information about our probate and estates services, please contact one of the [Menzies specialists](#) or complete our contact form below.